

Using FCIS



SOFTARC

What's in our documentation

In the following list of documentation, we use these icons:



- available on the CD



- available in print.



Product ReadMe file



for administrators



for users

- product requirements
- installation instructions
- creating client installation diskettes



Getting Started



for administrators



for users

- installation instructions
- initial configuration instructions



Administrator's Guide



for administrators



for users



- licensing your post office
- naming servers
- configuring network and modem sessions
- configuring FCIS and Internet Services
- using the FirstClass Intranet Server
- examples of conferences, conference groups, user groups, calendars, gateways, and model Desktops
- creating a web site



Administrator's Reference












for administrators



for users



- details about FirstClass Intranet Tools
- details about the server and Internet Services consoles
- details about the administrator's Desktop and menu
- details about fields on administration forms
- details about Internet Services
- details about creating a web site, languages, multiple sites, server side includes, and CGI
- troubleshooting tips for administrators

 	<i>Customizing FirstClass</i>	<input checked="" type="checkbox"/> for administrators	<input type="checkbox"/> for users
		<ul style="list-style-type: none"> • using FirstClass Designer • customizing FirstClass forms • customizing templates to render forms to the web • using forms to work with databases 	
 	<i>Using FCIS</i>	<input checked="" type="checkbox"/> for administrators	<input checked="" type="checkbox"/> for users
		<ul style="list-style-type: none"> • connecting to your server • using the FirstClass client • using a web browser with FCIS • using FirstClass Personal to work offline • using the FirstClass Network Notifier 	
 	<i>FCIS Quick Reference</i>	<input type="checkbox"/> for administrators	<input checked="" type="checkbox"/> for users
		<ul style="list-style-type: none"> • brief overview of connecting to your server, using the FirstClass client, and using a web browser with FCIS 	
	AdvConf.pdf	<input checked="" type="checkbox"/> for administrators	<input checked="" type="checkbox"/> for users
		<ul style="list-style-type: none"> • advanced configuration for FirstClass connections • connection scripts • modem concepts and standards • how FirstClass works with your modem 	
	SMAPI.pdf	<input checked="" type="checkbox"/> for administrators	<input checked="" type="checkbox"/> for users
		<ul style="list-style-type: none"> • using the Simple MAPI client 	
	Folders.pdf	<input checked="" type="checkbox"/> for administrators	<input checked="" type="checkbox"/> for users
		<ul style="list-style-type: none"> • description of FirstClass system folders and the .ini file 	

Using FCIS

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Getting started

Introduction

The FirstClass® Intranet Server (FCIS) is an easy-to-use, advanced communications and information system. With FCIS, you can:

- send and receive electronic mail (e-mail)
- transfer text and graphics files so that other users can access them
- browse and send messages to online forums
- organize items for easy access
- publish information on the World Wide Web (web).

This book describes all the things that can be done with FCIS. Depending on your FCIS license and the way your administrator has set up your user account, you may not be able to use all these features. For example, you may be able to read messages in certain areas, but not delete them.

If you are unclear about whether you should be able to use a particular feature, contact your administrator.

Our assumptions about you

This book is intended for people using FirstClass or a web browser such as Netscape® Communicator or Microsoft® Internet Explorer to work with FCIS.

We assume that you are familiar with:

- your operating system (Windows® or Mac™ OS)
- *if you are using a web browser to work with FCIS*
basic web browser use.

What you need to read

This book covers a number of topics that you may not need. At a minimum, we suggest you read:

- Chapter 2, “FCIS basics”
- Chapter 3, “A quick tour of FCIS messaging”
- Chapter 4, “Connecting to a server”

You only need to read about the basic logging in procedure that pertains to you. The latter part of this chapter concerns more advanced topics covering multiple logins.

- Chapter 8, “About conferences”
- the chapters in the “Working with messages” section that concern reading, creating, and replying to messages.

Installing FirstClass

For FirstClass client system requirements and installation instructions, see the ReadMe file on the FCIS CD.

New in this release

- ✓ Use a personal online calendar to keep track of meetings, appointments, and so on, as well as things you need to do.
- ✓ Use public calendars to synchronize work and to book resources and locations.
- ✓ Specify your Mailbox or a conference or folder window as your home location. You can connect directly to this location when you log into a server.
- ✓ Clear all but the selected settings file from File on the Login screen.
- ✓ Forward messages to your paging system.
- ✓ Insert files in messages and documents, and attach recordings to messages.
- ✓ Format text quickly using a Text Properties dialog box.

- ✓ Default text size creates 10 point text in Windows and 9 point text on Mac OS.
- ✓ Create documents using special forms that ensure good results when viewed with a web browser.
- ✓ Specify separate message forward and reply preferences for different categories of mail.
- ✓ Use File > Upload to upload text files as FirstClass documents.
- ✓ Connect using UDP/IP or a Netscape or Microsoft IMAP client such as Outlook Express.

Documentation conventions

- Menu items** Each level of menu items is separated by >. For example, the Clear item under the Edit menu is shown as Edit > Clear.
- Variables** Text in *italics* represents variables for which you must type your own value.

1

Changes to menu commands

Previous release	This release
File > New > New Message	Message > New Message
File > New > New Document	Message > New Document
File > New > list of message forms	Message > New Message Special > list of forms
File > Page Setup (Windows)	File > Print Setup (Windows)
Edit > Add > Add to Address Book	Conferencing > Add to Address Book
Edit > Add > Add to Desktop	Conferencing > Add to Desktop
Edit > Add > Add to Bookmarks	Conferencing > Add to Bookmarks
Edit > Font... (Windows)	Edit > Format Text

Changes to menu commands

FCIS basics

This chapter provides an overview of the FCIS system and the objects you will use when working with FCIS.

FCIS objects

Messages

Messages are pieces of e-mail that are sent through FCIS. Messages may be sent:

- locally on the same FCIS server
- through a gateway that connects to another FCIS server or another messaging system
- through the Internet to anyone who can receive e-mail.

Every FCIS user has a Mailbox. Your Mailbox stores all messages sent to you, as well as copies of messages that you send.

Documents

You can create documents on FCIS much as you do messages. These are the differences between a message and a document:

A message	A document
is intended for mailing to someone electronically, and therefore includes an envelope area with space for address information	is intended for posting directly to an area where others can see it, and therefore does not include an envelope area
cannot be edited after being sent (although FCIS does let you unsend a message)	can be edited after it has been posted
expires after a certain period by default	never expires by default

A message	A document
is automatically named with the name of the sender (for mail received) or recipient (for mail sent)	must be named using a special dialog box

Uploaded files

There are several ways to transfer text and graphics files so that they are available to others. You can attach these files to messages (or insert them in message bodies), then mail the messages, or copy the files directly to FCIS. A file that has been copied directly to FCIS is called an uploaded file.

Folders

FCIS folders work just like other folders you are used to on your operating system. You can create and name folders, then put messages and documents in them to organize your work area for easy access.

In addition, your administrator may create external folders that act as links to folders outside the FCIS system.

Conferences

At first glance, FCIS conferences look just like folders. A conference serves the same purpose of putting items with a common topic into one place, but there are some important differences:

A conference	A folder
is intended mainly as an online forum for the exchange of information	is intended mainly as an organizational aid
has controlled access; users need the appropriate permission to see it	does not have directly controlled access; the object within which the folder was created determines the folder's access
can be the recipient of messages	can only hold messages that have been moved there
is flagged when it contains unread mail	does not indicate that it contains unread mail

If your administrator has created a description of a conference, you can see this description by selecting the conference, then choosing Conferencing > About Conference.

For more information about conferences, see the “Using conferences” section of this book.

Calendars

FCIS includes online calendars that record time commitments, such as meetings, and tasks that you need to complete. In addition to your own personal calendar, you may have access to public calendars that let you schedule meetings at mutually convenient times.

For more information about calendars, see the “Using calendars” section of this book.

About the FCIS system

There are two parts to the FCIS system: a server and a client.

Server

An FCIS server stores all your messages and documents, and the Mailbox, conference and folder structure that contains these items. It also contains information about all the users known to the server.

When you log into FCIS, you connect to a server. Your organization may have multiple servers, perhaps one in each branch office, and you may be able to connect to some of these servers as well. On each server, you will see the conferences that the administrator for that server has given you permission to see. The server to which you normally connect is considered your home server.

Client

Client software runs on your computer. It connects to an FCIS server, and provides the interface (such as menu commands) that lets you work with FCIS objects.

You use one of the following FCIS clients to connect to a server:

- FirstClass
- a web browser.

FirstClass for Windows or Mac OS and web browsers work with FCIS in similar ways, and all are described in this book.

A quick tour of FCIS messaging

This chapter provides a quick tour of these common messaging tasks:

- reading a message
- replying to a message
- forwarding a message
- creating a new message
- attaching a file to a message.

This tour is given twice: first for users of the FirstClass client, and second for web browser users.

The rest of this book provides detailed information about all the things you can do with FCIS.

3

A quick tour using FirstClass

Roy Allen installed FirstClass on his Windows NT machine, configured it to connect to his FCIS server, and created a FirstClass shortcut on his Windows desktop. He decides to connect to his FCIS server to check for new mail.

He double-clicks the FirstClass shortcut to start FirstClass.

FirstClass shortcut



This opens the FCIS Login screen.

A quick tour using FirstClass

Login screen (FirstClass)



Roy types his user ID and password, then clicks Login. This opens his FCIS Desktop.

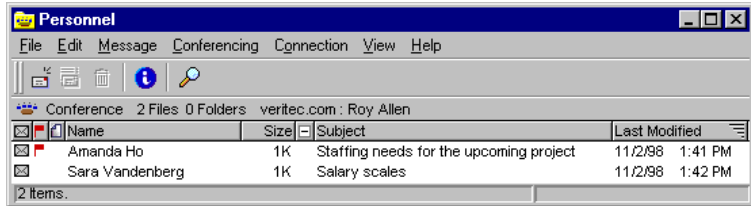
Details in Chapter 4, “Connecting to a server”

Desktop (FirstClass)



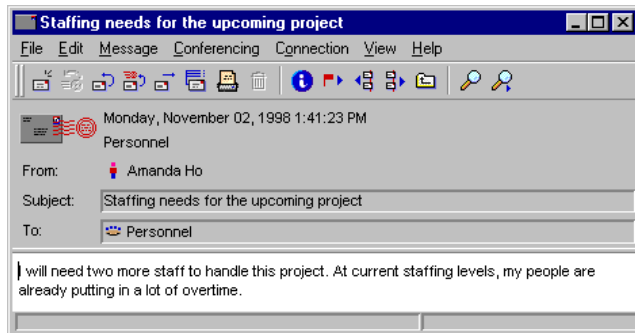
Roy notices red flags beside both his Mailbox and Personnel icons. This means that he has received new private mail, and there is unread public mail in the Personnel conference. Roy decides to check the mail in the Personnel conference first. He opens this conference by double-clicking it.

Conference (FirstClass)



One of the messages in the conference has a red flag beside it. This is the unread mail that caused the Personnel conference icon on Roy's Desktop to display a red flag. Roy opens this message by double-clicking it.

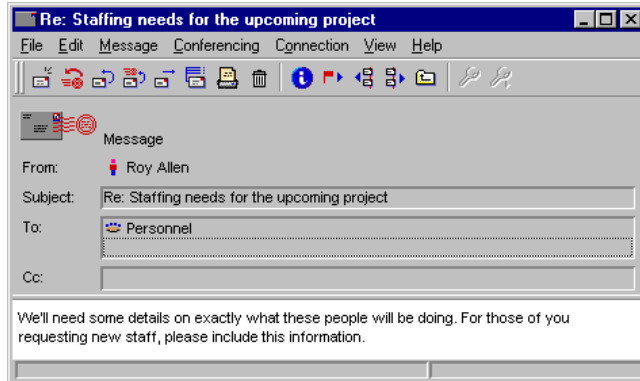
Message (FirstClass)



Roy has further thoughts on this topic that he wants others monitoring the conference to read. He decides to reply to the message, and chooses Message > Reply. This creates a new message that is addressed to the conference and references the original message. Roy types his comments in the body of the message, then sends the message to the conference by choosing Message > Send. (He could also have clicked Send on the toolbar.)

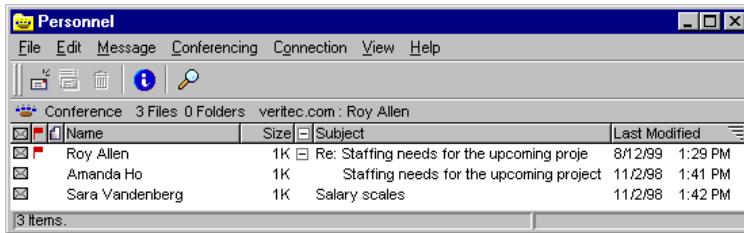
Details in Chapter 17, "Replying to messages"

Reply (FirstClass)



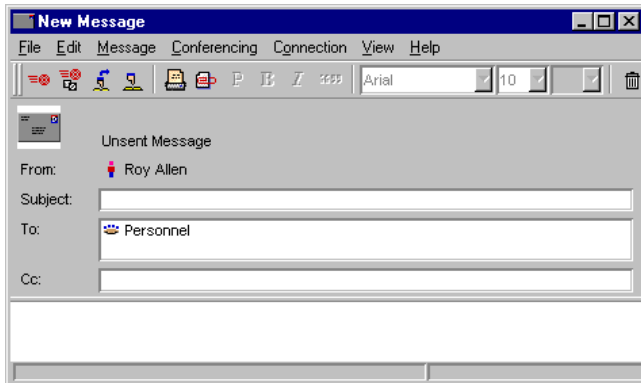
Roy closes the sent message by choosing File > Close. The conference now shows Roy's reply as an unread message.

Conference with reply (FirstClass)



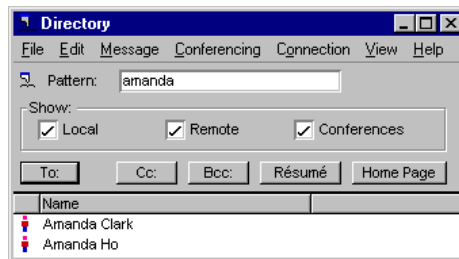
Roy wants to post another message to this conference, and he wants the readers of this new message to have access to a separate file containing additional information. To accomplish this, Roy first creates a new message by choosing Message > New Message. A new message addressed to the conference opens.

New message (FirstClass)



Roy types a subject for his message at Subject, then types the body of his message. He decides that he would also like to send this message to Amanda Clark. Being unsure of the spelling of Amanda's last name, he just types amanda in the To field, then presses Tab. FCIS presents him with a list of all users with names including amanda.

Directory (FirstClass)

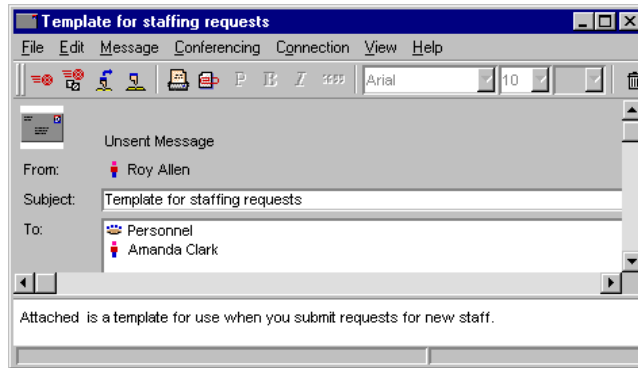


Roy double-clicks Amanda Clark's name to put it in the To field.

Details in Chapter 13, “Addressing messages”

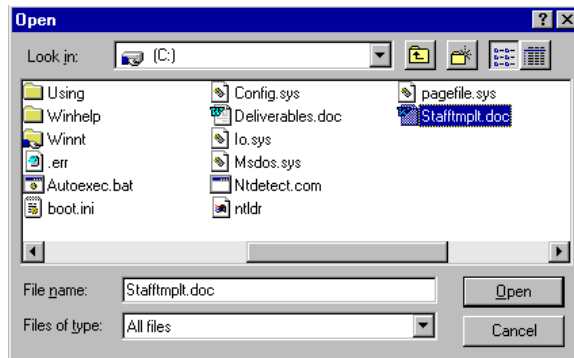
A quick tour using FirstClass

Addressed message (FirstClass)



The last thing Roy has to do before sending this message is to attach his file to it. To do this, he chooses File > Attach File, then browses the Open dialog box until he finds the file he wants.

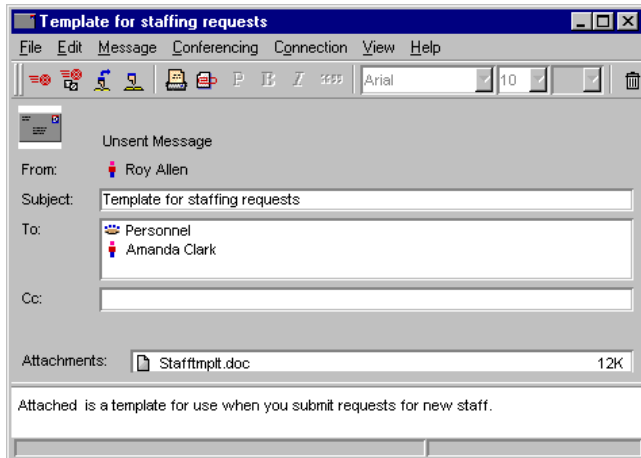
Open dialog box



Roy selects his file, then clicks Open. After file transfer is complete, an Attachments fields appears in Roy's message.

Details in Chapter 19, "Files attached to messages"

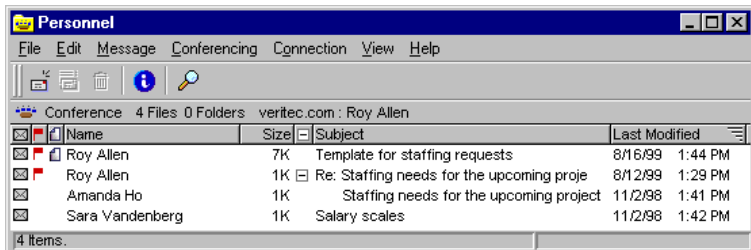
Attached file (FirstClass)



Roy now sends his message by choosing Message > Send, then closes it by choosing File > Close. Amanda will see her copy of the message in her Mailbox, and can copy the attached file to her computer by choosing File > Save Attachment. The copy sent to the conference appears as an unread message with an attachment.

3

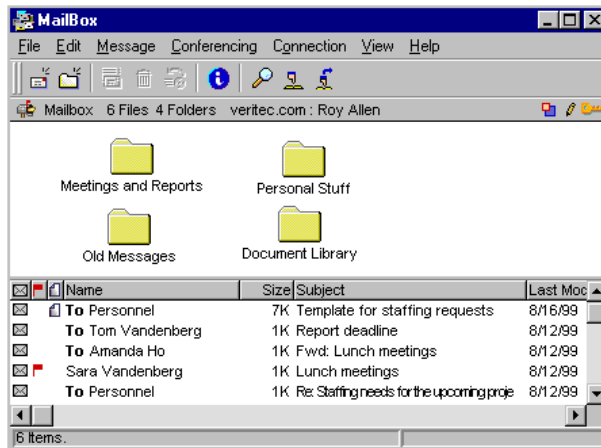
Message attachment in conference



Roy now turns his attention to the private mail in his Mailbox. He closes the Personnel conference by choosing File > Close. Back at his Desktop, he opens his Mailbox by double-clicking it.

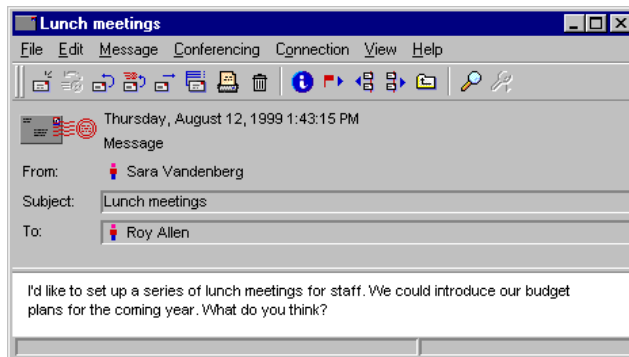
A quick tour using FirstClass

Mailbox (FirstClass)



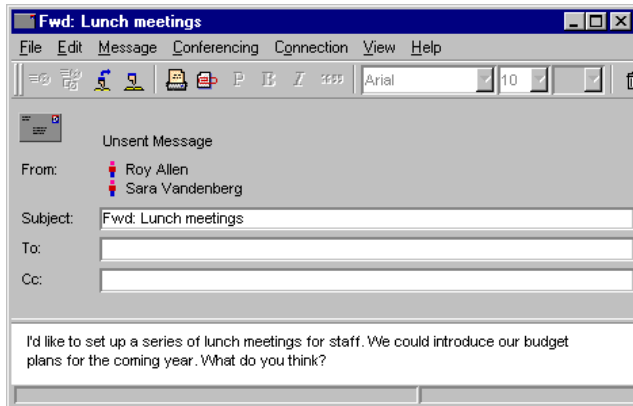
He opens the first unread message by double-clicking it.

Message in Mailbox (FirstClass)



Roy decides that this message is better handled by Amanda Ho. He wants to forward the message to her, and so chooses Message > Forward. This creates a copy of the message that he can now address to Amanda.

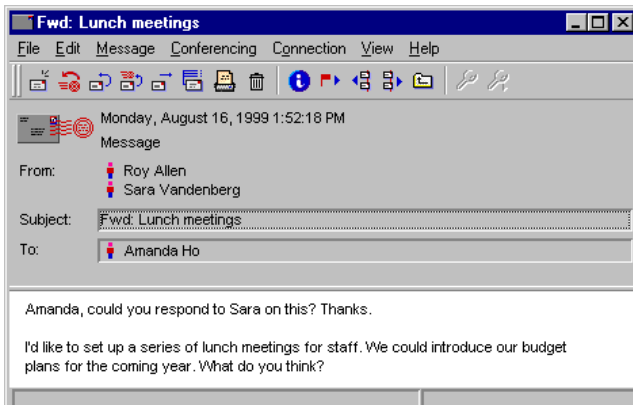
Forwarded message unaddressed
(FirstClass)



He addresses the message by typing Amanda Ho in the To field, then pressing Tab. He also adds some explanatory text to the message body, then sends the message by choosing Message > Send.

Details in Chapter 15, “Sending messages”

Forwarded message (FirstClass)



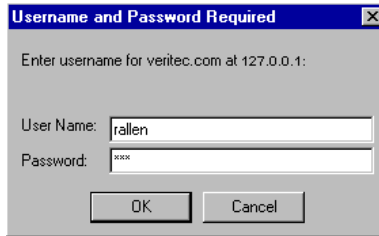
Roy has done all he wants for now in FCIS, so he chooses File > Exit. This disconnects him from the FCIS server and quits FirstClass.

3

A quick tour using a web browser

Roy Allen decides to connect to his FCIS server to check for new mail. He starts his web browser, then enters the Internet address (URL) for his FCIS server. This opens the FCIS Login screen.

Login screen (web)

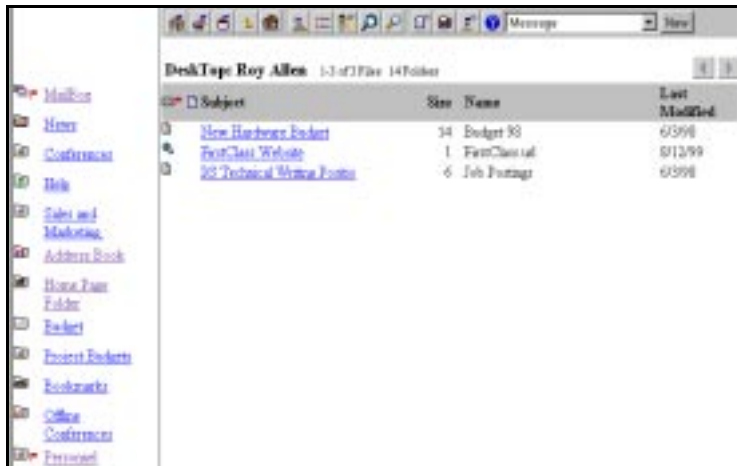


A dialog box titled "Username and Password Required" with a close button (X) in the top right corner. The text inside says "Enter username for ventec.com at 127.0.0.1:". Below this, there are two input fields: "User Name:" with the text "rallen" entered, and "Password:" with "xxx" entered. At the bottom, there are two buttons: "OK" and "Cancel".

Roy types his user ID and password, then clicks OK. This opens his FCIS Desktop.





Details in Chapter 4, "Connecting to a server"

Desktop (web)





Roy notices red flags beside both his Mailbox and Personnel icons. This means that he has received new private mail, and there is unread public mail in the Personnel conference. Roy decides to check the mail in the Personnel conference first. He goes to this conference by clicking it.



Conference (web)

Conference: Personnel 1-2 of 2 Files 8 Folders				
  Subject	Size	Name		Last Modified
 Salary scales	1	Sara Vandenberg		11/2/98
 Staffing needs for the upcoming project	1	Amanda Ho		11/2/98

One of the messages in the conference has a red flag beside it. This is the unread mail that caused the Personnel conference link on Roy's Desktop to display a red flag. Roy opens this message by clicking it.

Message (web)

 Mon, 02 Nov 1998 12:41:23 -0400 

From:  [Amanda Ho](#)
Subject: Staffing needs for the upcoming project
To:  [Personnel](#)

I will need two more staff to handle this project. At current staffing levels, my people are already putting in a lot of overtime.

Roy has further thoughts on this topic that he wants others monitoring the conference to read. He decides to reply to the message, and clicks Reply. This creates a new message that is addressed to the conference and references the original message. Roy types his comments in the body of the message, then sends the message to the conference by clicking Send.

Details in Chapter 17, "Replying to messages"

3

A quick tour using a web browser

Reply (web)

From: Roy Allen

Subject: Re: Staffing needs for the upcoming proje

To: Personnel

Cc:

Attachments:

Amanda Ho writes:
>I will need two more staff to handle this project. At current
staffing
>levels, my people are already putting in a lot of overtime.

We'll need some details on exactly what these people will be
doing. For those of you requesting new staff, please include
this information.

Urgent Message: ☐ **Receipt on Read:** ☐

Roy returns to the conference listing by clicking the link at the confirmation.

Confirmation

Message successfully sent.

Click here to return to </Login/Personnel/>

The conference now shows Roy's reply as an unread message.

Conference with reply (web)

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Subject	Size	Name	Last Modif
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Re: Staffing needs for the upcoming proje	1	Roy Allen	11/2/9
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salary scales	1	Sara Vandenberg	11/2/9
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Staffing needs for the upcoming project	1	Amanda Ho	11/2/9

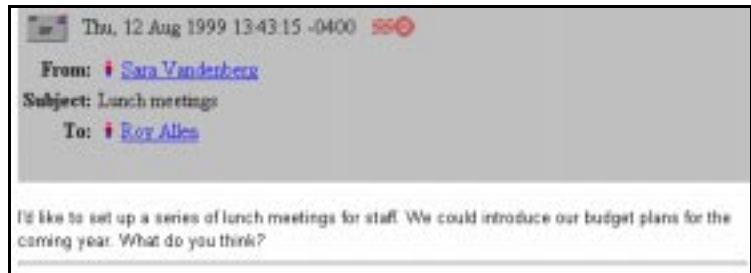
Roy now turns his attention to the private mail in his Mailbox. He goes to it by clicking Mailbox.

Mailbox (web)



Roy opens the first unread message by clicking it.

Message in Mailbox (web)



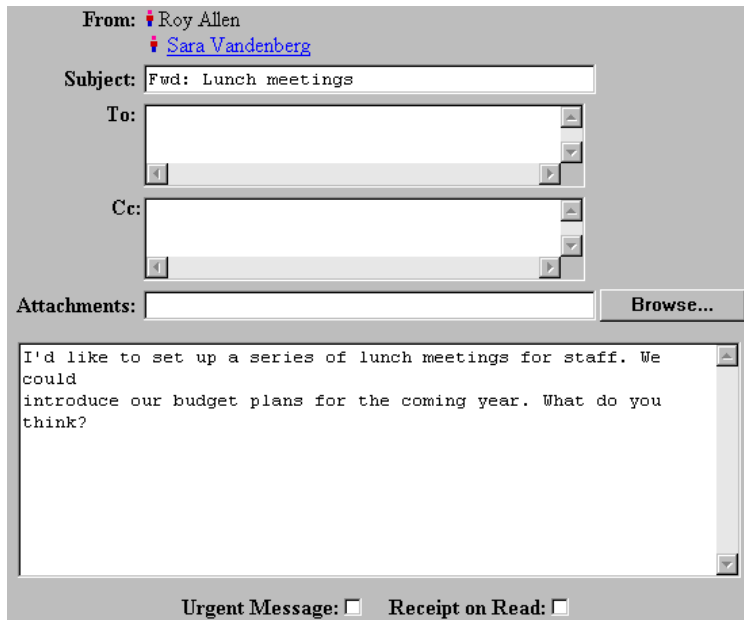
Roy decides that this message is better handled by Amanda Ho. He wants to forward the message to her, and so clicks Forward. This creates a copy of the message that he can now address to Amanda.

Details in Chapter 16, “Forwarding messages”

3

A quick tour using a web browser

Forwarded message unaddressed
(web)



The screenshot shows a web browser interface for a forwarded email. The header section includes the following fields:

- From:** Roy Allen (with a small red icon) and Sara Vandenberg (with a small red icon and a blue link).
- Subject:** Fwd: Lunch meetings
- To:** An empty text box with a small red icon and a dropdown arrow.
- Cc:** An empty text box with a small red icon and a dropdown arrow.
- Attachments:** An empty text box with a "Browse..." button.

The main body of the email contains the following text:

I'd like to set up a series of lunch meetings for staff. We could introduce our budget plans for the coming year. What do you think?

At the bottom of the interface, there are two checkboxes: "Urgent Message: ☐ Receipt on Read: ☐

He addresses the message by typing Amanda Ho in the To field. He also adds some explanatory text to the message body, then sends the message by clicking Send.

Details in Chapter 15, "Sending messages"

Forwarded message (web)

From: Roy Allen
Sara Vandenberg

Subject: Fwd: Lunch meetings

To: Amanda Ho

Cc:

Attachments: Browse...

Amanda, could you respond to Sara on this? Thanks.

I'd like to set up a series of lunch meetings for staff. We could introduce our budget plans for the coming year. What do you think?

Roy returns to his Mailbox by clicking the link at the confirmation. He wants to send a message to Sara Vandenberg, and he also wants her to have access to a separate file containing additional information.

Roy is unsure of the spelling of Sara's last name, so he first clicks Directory, then types sara at the Name field and clicks Search. All users with names including sara are listed.

Directory (web)

Enter the name you wish to look for. If you are unsure of the name, then just type the first few letters of the name.

Name: Search

Sara L. Jones	Sara L. Jones		
Sara Vandenberg	Sara Vandenberg		

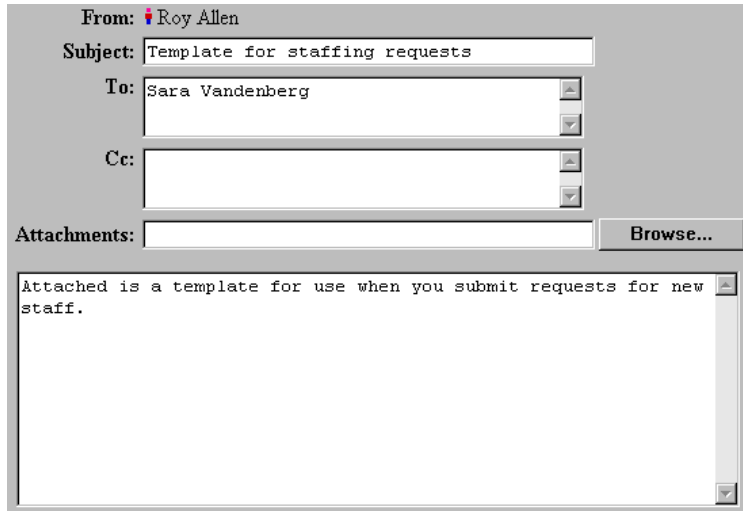
Roy clicks Sara Vandenberg's address (the second column). This creates a new message addressed to her. He types a subject for his message at Subject, then types the body of his message.

Details in Chapter 13, "Addressing messages"

3

A quick tour using a web browser

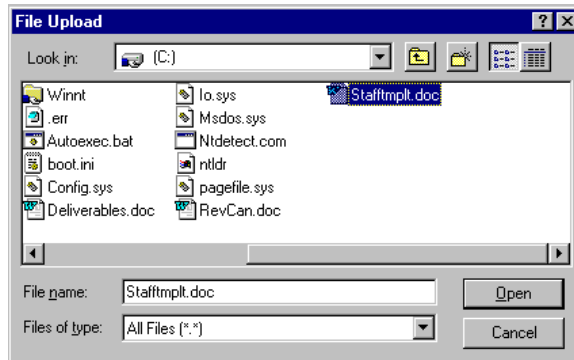
New message (web)



The screenshot shows a web-based email composition interface. At the top, the 'From' field is populated with 'Roy Allen'. The 'Subject' field contains 'Template for staffing requests'. The 'To' field is filled with 'Sara Vandenberg'. The 'Cc' field is empty. Below these fields is an 'Attachments' section with a text input field and a 'Browse...' button. The main body of the email contains the text: 'Attached is a template for use when you submit requests for new staff.'

The last thing Roy has to do before sending this message is to attach his file to it. To do this, he clicks Browse at the Attachment field, then browses the File Upload dialog box until he finds the file he wants.

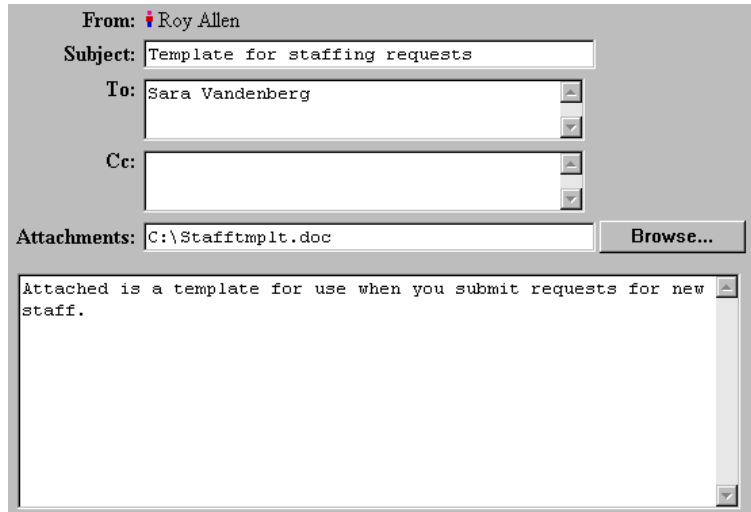
File Upload dialog box



Roy selects his file, then clicks Open. The file is attached to his message.

Details in Chapter 19, “Files attached to messages”

Attached file (web)



The screenshot shows a web-based email composition interface. It includes fields for 'From' (Roy Allen), 'Subject' (Template for staffing requests), 'To' (Sara Vandenberg), and 'Cc' (empty). The 'Attachments' section shows a file named 'C:\Stafftmpl.doc' with a 'Browse...' button. Below these fields is a large text area containing the message body: 'Attached is a template for use when you submit requests for new staff.'

From: Roy Allen

Subject: Template for staffing requests

To: Sara Vandenberg

Cc:

Attachments: C:\Stafftmpl.doc **Browse...**

Attached is a template for use when you submit requests for new staff.

Roy now sends his message by clicking Send, then returns to his Mailbox by clicking the link at the confirmation. Sara will see her copy of the message in her Mailbox, and can copy the attached file to her computer by clicking the attachment.

Roy has done all he wants for now in FCIS. To prevent someone else from getting back to his FCIS web pages, he closes his web browser. This forces anyone who wants to connect to the server to supply a user ID and password once more.

3

A quick tour using a web browser

Connecting to a server

You can connect (log in) to an FCIS server using either FirstClass or a web browser. Depending on how your administrator set up the server and your user account, you may be able to log in as:

- a registered user

Your administrator provided you with a personal user ID and password.

- a user who can autoregister

Your administrator set up the server to allow autoregistration. Once you have autoregistered, you log in thereafter as a registered user.

- a guest user.

Your administrator provided you with a user ID and password that accesses a guest account. Guests are generally more limited in what they can do than registered users.

4

Logging in using FirstClass

The first time you log in The first time you start FirstClass, you are asked to fill in the Service Setup form. You can do one of the following:

- use the settings file supplied by your administrator
Click Cancel, then choose this settings file at File. For information on settings files, see “Settings files” on page 37.
- configure the connection to the server yourself
For instructions, see the “Configuring your FirstClass connection” section of this book.
- log into FirstClass.com, FirstClass’ own server.

Click Cancel, then choose firstclass.fc at File. This settings file is configured to connect using TCP/IP. If you have a different connection type, configure this connection as described in the “Configuring your FirstClass connection” section of this book.

Logging in as a registered user

To log into an FCIS server as a registered user, you must have:

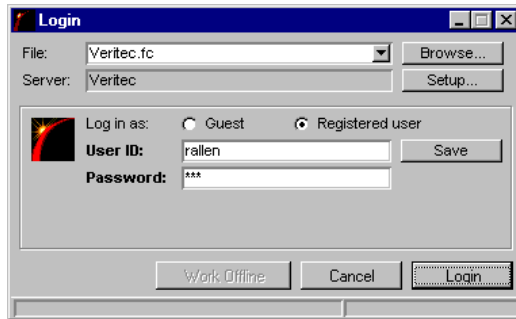
- a valid user ID and password
- a settings file that contains connection information for the server.

For information on settings files, see “Settings files” on page 37.

To log in:

1. Double-click the FirstClass icon.

Login screen (registered users)



2. Fill in the following fields on the Login screen:

- | | |
|------------------------|---|
| File | the settings file for the server to which you want to connect
If the settings file is not listed here, click Browse to search for the file. Click Open with the file selected. |
| Registered user | make sure this field is selected |
| User ID | type your user ID, if this information is missing |
| Password | type your password, if this information is missing |

You can save your user ID and/or password in the settings file by clicking Save after you type this information. If you do this, you will not have to type this information for future logins when you choose this server.

Note For security reasons, we do not recommend that you save your password in the settings file.

3. Click Login to open your FCIS Desktop.

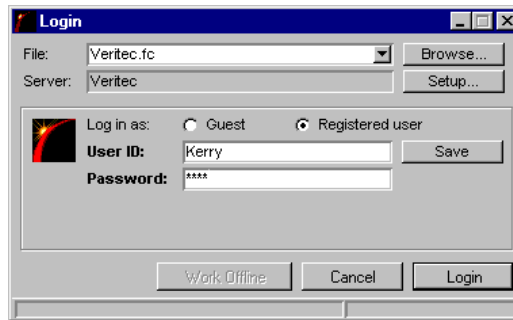
Autoregistering

To log into an FCIS server and register, you must have a settings file that contains connection information for the server. For information on settings files, see “Settings files” on page 37.

To autoregister:

1. Double-click the FirstClass icon.

Login screen (autoregistering)



2. Fill in the following fields on the Login screen:

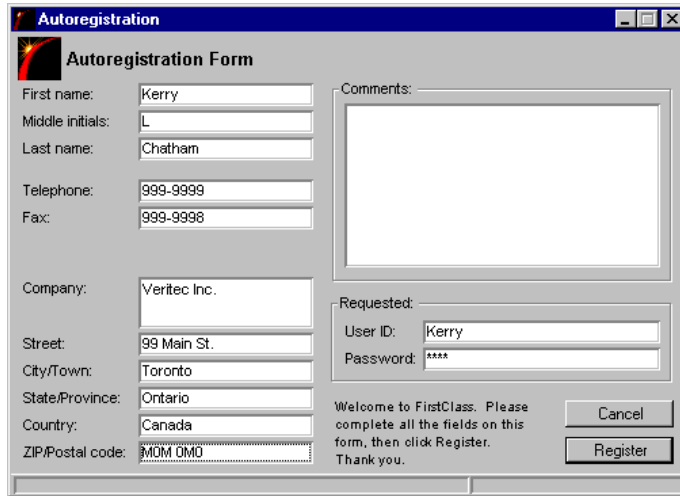
- | | |
|------------------------|---|
| File | the settings file for the server to which you want to connect

If the settings file is not listed here, click Browse to search for the file. Click Open with the file selected. |
| Registered user | make sure this field is selected |
| User ID | the user ID you want to register |
| Password | the password you want to register |

3. Click Login.

4. Fill in the Autoregistration Form.

Autoregistration Form (FirstClass)



The screenshot shows the 'Autoregistration' window with the following fields and values:

Field	Value
First name:	Kerry
Middle initials:	L
Last name:	Chatham
Telephone:	999-9999
Fax:	999-9998
Company:	Veritec Inc.
Street:	99 Main St.
City/Town:	Toronto
State/Province:	Ontario
Country:	Canada
ZIP/Postal code:	M0M 0M0
Comments:	
Requested:	
User ID:	Kerry
Password:	****

Buttons: Cancel, Register

Message: Welcome to FirstClass. Please complete all the fields on this form, then click Register. Thank you.

5. Click Register.

6. Record your user ID and password from the confirmation screen.

Registration Confirmed screen
(FirstClass)



The screenshot shows the 'Registration Confirmed' window with the following information:

You have been registered with the following user ID and password. Please write down this information and use it each time you log in.

Registration information	
User ID:	Kerry
Password:	ls1t

Buttons: Save, OK

7. Click one of the following:

- OK** opens your FCIS Desktop
- Save** opens your FCIS Desktop, and saves your user ID and password in the settings file

If you click Save, your user ID and password will be displayed on the Login screen the next time you choose this server. If you do not want this information displayed automatically, click OK instead.

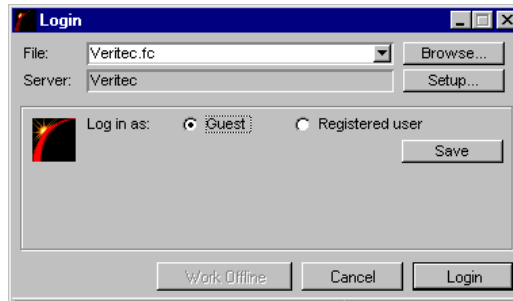
Logging in as a guest user

To log into a guest account on an FCIS server, you must have a settings file that contains connection information for the server. For information on settings files, see “Settings files” on page 37.

To log in:

1. Double-click the FirstClass icon.

Login screen (guest users)



2. Fill in the following fields on the Login screen:

- | | |
|--------------|---|
| File | the settings file for the server to which you want to connect

If the settings file is not listed here, click Browse to search for the file. Click Open with the file selected. |
| Guest | make sure this field is selected |

3. Click Login to open the guest FCIS Desktop.

Logging in using a web browser

To log into an FCIS server using a web browser, you must know the Internet address (URL) of the server. This URL will look something like this:

`http://server name or address/login`

For example, to access FirstClass.com over the web, type:

`http://www.firstclass.com/login`

Note If you have a dial-up connection, call your Internet Service Provider (ISP), log in, then start your web browser.

Logging in using a registered user ID

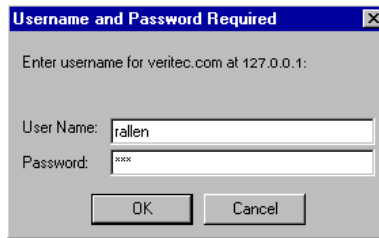
To log into either your own personal account or a guest account, you must have:

- a valid user ID and password
- the URL for the server.

To log in:

1. Enter the URL of the server in your web browser to open the Login screen.

Login screen (web)



2. Type the user ID and password.
3. Click OK to open the FCIS Desktop.

Autoregistering

To log into an FCIS server and register, you must know the URL for the server.

To autoregister:

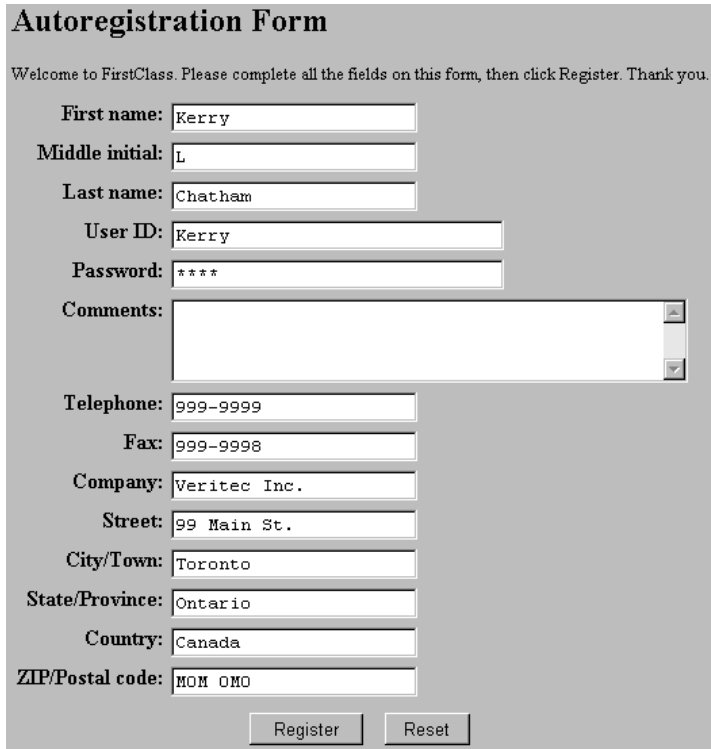
1. Enter the URL of the server in your web browser.

Do not type /login at the end of this URL.

2. Click the Autoregister link.
3. Fill in the Autoregistration Form.

Supply the user ID and password that you want to register as part of this information.

Autoregistration Form (web)



Autoregistration Form

Welcome to FirstClass. Please complete all the fields on this form, then click Register. Thank you.

First name:

Middle initial:

Last name:

User ID:

Password:

Comments:

Telephone:

Fax:

Company:

Street:

City/Town:

State/Province:

Country:

ZIP/Postal code:

4. Click Register.
5. Record your user ID and password from the confirmation page.
6. *to go to your Desktop*
Click Desktop to open the Login screen, then log in as a registered user.

Logging in using an IMAP client

If you have a client that supports the IMAP4rev1 standard (Netscape IMAP client, or a Microsoft IMAP client such as Outlook Express), you can use this client to connect to an FCIS server. For instructions, see your client documentation.

Making a connection the default

Applies to FirstClass only.

If you will usually connect to a particular server, you can make the settings file for that server the default choice in the Login screen. To do this:

1. Choose Edit > Preferences.
2. Choose the settings file you want at Default settings file on the Connection tab.
3. Click OK.

The server specified in this settings file will also be used as the return address for messages that you send from FirstClass out over the Internet.

Note For all preferences, you can click Apply to save your changes without closing the Preferences window, or click Default to restore every preference to the FirstClass default.

Connecting directly to a particular window

Applies to FirstClass only.

When you first connect to a server, the Desktop normally opens. You can make another window, such as your Mailbox or a specific conference, open instead. To do this:

1. Open the appropriate window.
2. Choose Connection > Make Window My Home Location.
3. Choose Edit > Preferences.
4. Select Connect automatically on the Connection tab.

Note Home location shows the location of the window you chose as your home location. To change your home location to FirstClass' default, which is FirstClass.com, click Use Default Location.

5. Click OK.

Settings files

Applies to FirstClass only.

FirstClass stores the information needed to connect to an FCIS server in a settings file. Settings files can also store resources used by FirstClass to render FCIS content, such as forms, pictures, and sounds. In Windows, settings files always end in .fc.

When you first install FirstClass, you have two settings files:

- home.fc

This is the default settings file.

- firstclass.fc

This connects you to FirstClass.com.

In addition, your FCIS administrator may have provided you with a settings file that contains the necessary information for logging into your server. If this is the case, put this file in the Settings folder inside the FirstClass application folder.

4

Updating settings files

If you need to change connection information for an existing settings file, click Setup on the Login screen, change the information as required, then click Save. For information on how to configure a connection, see the “Configuring your FirstClass connection” section of this book.

Your administrator may mail you an updated version of your settings file, or upload this settings file to the server. To incorporate these updates into your copy of the settings file:

1. Log into FCIS using the settings file that you want to update.
2. Double-click the administrator’s settings file.

If this settings file is attached to a message, you can double-click it directly from the message.

3. Click Update at the Resource Updater screen.

Note If the settings file is large or you are on a slow connection, you may have to wait for this screen to open.

Clearing resources from the settings file

FirstClass can import a picture or form resource from your server as you need it; however, it will only do so if you do not already have a copy of the resource in your settings file.

If you know there are updated resources on the server, and you want to import them, you must clear your old resources from your settings file. To do this:

1. Open the Login screen.
2. Make sure the settings file you want to clear is displayed at File.
3. Click Setup.
4. Click Flush Cache.

The connection information in your settings file is not affected when you clear the file resources.

Clearing settings files from the Login screen

As you select and create various settings files, the list of files grows at File on the Login screen. If this list becomes unwieldy, you can clear it.

To clear all but the selected settings file from the list of files:

- right-click this field, then choose Clear (Windows)
– or –
- tab to this field, then choose Edit > Clear (Mac OS).

The cleared settings files remain in FirstClass' Settings folder, so you can still browse to select them.

Changing your password

If you are a registered user, your administrator provided you with an FCIS password. For security reasons, we recommend that you change this password to something only you know.

Make your password difficult to guess. Consider mixing numbers and letters. Do not use your own name or user ID, or any other easily guessed word, such as your birth date or the name of a family member or pet. Passwords can be up to 12 characters.

To change your password:

1. Log into the server for which you want to change your password.

2. *FirstClass*

Choose Connection > Change Password.

web

Click Preferences, then Change Password.

Change Password screen
(FirstClass)



3. Fill in the following information on the Change Password screen:

Old password your current password

New password the password you want to use

Retype password your new password again, for verification

4. Click OK (*FirstClass*) or Change (*web*).

Connecting to multiple servers

If you have access to multiple servers, you can connect to more than one at the same time. If you are connected to multiple servers, you will see a Desktop for each one.

To connect to multiple servers using *FirstClass*:

1. Log in as you normally do, choosing the settings file for the first server at File on the Login screen.

2. Choose Connection > Connect to open the Login screen again.
3. Log in as you normally do, choosing the settings file for the second server at File.
4. Repeat as many times as required.

If you can start multiple separate web browser sessions, you can log into a different server with each session.

Logging in with multiple user IDs

If you have multiple user IDs, or can autoregister, you can open multiple connections to the same server with these user IDs. If you are connected using multiple user IDs, you will see a Desktop for each one.

To log in with multiple user IDs using FirstClass:

1. Log into the server as you normally do, using the first user ID and password with which you want to connect.
2. Choose Connection > Connect to open the Login screen again.
3. Log in using the second user ID and password with which you want to connect.
4. Repeat as many times as required.

If you can start multiple separate web browser sessions, you can log in using a different user ID for each session.

Logging in from multiple computers

Your administrator may allow you to log into the same server using the same user ID and password from multiple computers. If you are connected multiple times using the same user ID, and your administrator has limited the length of time you can connect per day, be aware that the time spent by all connections is added together and counted against your daily time allotment. For example, if your first connection has been active for 30

minutes, and your second connection has been active for 15 minutes, you are considered to have used up 45 minutes of your daily time allotment.

Tip If you have a very limited daily time allotment, and you just want to perform basic tasks such as reading and sending messages, consider connecting using a web browser. The web browser only connects when there is data to exchange with the server, and then only stays connected long enough for the data to be sent.

To log in from multiple computers, simply log in from each one as you normally do.

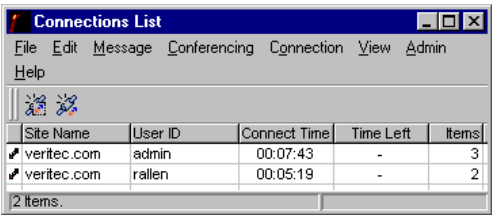
Checking your connections

Applies to FirstClass only.

To see a list of all FCIS servers to which your computer is connected, and all user IDs used for these connections, choose Connection > List Connections. The Connections List opens.

4

Connections List



Site Name	User ID	Connect Time	Time Left	Items
veritec.com	admin	00:07:43	-	3
veritec.com	ralien	00:05:19	-	2

Each row in this list represents one active connection, and shows the following information:

- Site Name** the server to which you are connected
- User ID** the user ID with which you are connected to this server
- Connect Time** the length of time you have been connected, in hh:mm:ss format

Time Left	the length of time you have left before you will be automatically logged off Your administrator may have defined a maximum time that you can be connected per day. If a dash shows here, you do not have a daily connection time limit for this server.
Items	the number of windows open for this connection

There are several ways you can work with connections from this list:

To	Do this
bring all windows for a particular connection to the foreground, in the order they were opened	double-click the connection
end a connection	select the connection, then click Disconnect Selected
end all connections	click Disconnect All

Disconnecting from a server

Disconnecting using FirstClass

As well as using the Connections List to disconnect from a server, you can do one of the following:

To	Do this
end your current connection	choose Connection > Disconnect – or – close all open windows for this connection
end all connections and quit FirstClass	choose File > Exit (Windows) or Quit (Mac OS)

Storing connection information

In your FirstClass connection caching preferences, you can tell FirstClass to store (cache) your connection information for a specific length of time. If you do this, then close all open windows for a connection, you can reconnect to the server within this time period without having to log in again.

To cache connection information:

1. Choose Edit > Preferences.
2. Select Cache connection information on the Connection tab.
3. Specify the length of time you want FirstClass to cache this information at Time to cache.
4. Click OK.

Reconnecting to a server

If you disconnected from a server or closed all open windows for a connection without telling FirstClass to cache connection information, you are disconnected immediately. You must log in again to reconnect.

If you told FirstClass to cache connection information, and you closed all open windows for a connection, you can reopen the Desktop of that connection without logging in again. You must do this before the connection caching interval that you specified in your preferences has elapsed.

To reconnect:

1. Do one of the following:
 - *Windows 95/98/NT*
right-click the FirstClass icon in the taskbar
 - *Windows 3.1*
click the FirstClass icon, then choose Restore
 - *Mac OS*
choose Connection.
2. Do one of the following:
 - *if connection information is not cached*
choose Connect from the menu, then log in
 - *if connection information is cached*
choose the server from the menu to reopen the Desktop.

Disconnecting using a web browser

Although a web browser only connects to the server when there is data to exchange, for security reasons, we suggest that you

close your browser when you are finished with the server. This forces other users with access to your computer to supply a user ID and password to reconnect to the server.

Using FirstClass commands

This chapter describes the basic FirstClass command interface. There are often several ways you can perform the same task with FirstClass. For example, you can delete selected text in a message you are composing by:

- choosing Edit > Clear from the menu
- pressing Delete on the keyboard
- right-clicking (Windows), clicking and holding the mouse button (Mac OS), or Control-clicking (Mac OS 7.6 and later), then choosing Clear from the shortcut menu.

To open a conference or folder, and move a message, document, or file to it, you can:

- open the target conference or folder by double-clicking it, then drag the object to the target
- drag the object and hover over the target until it opens.

In some cases, you can also click a toolbar or dialog box button, or use a keyboard shortcut.

When there is a menu command for a task, that is the method described in this book. Where applicable, convenient double-click or drag options are also described.

Note Your operating system may limit what operations you can perform. For example, Windows 3.1 does not support drag-and-drop operations.

FirstClass toolbars

Each FirstClass window has its own toolbar. Toolbar buttons provide shortcuts to a number of common FirstClass tasks. These buttons are an alternative to choosing a task from the menu. You can specify which buttons are on a toolbar, and the order in which they appear.

To see a description of a toolbar button, hover over the button. The button name pops up, and a fuller description is provided in the status bar that runs along the bottom of a FirstClass window.

Showing and hiding a toolbar

To show a toolbar, choose View > Toolbars > Show Toolbar.

To hide a toolbar, choose View > Toolbars > Hide Toolbar.

Showing and hiding the status bar

To show the status bar, choose View > Toolbars > Show Status Bar.

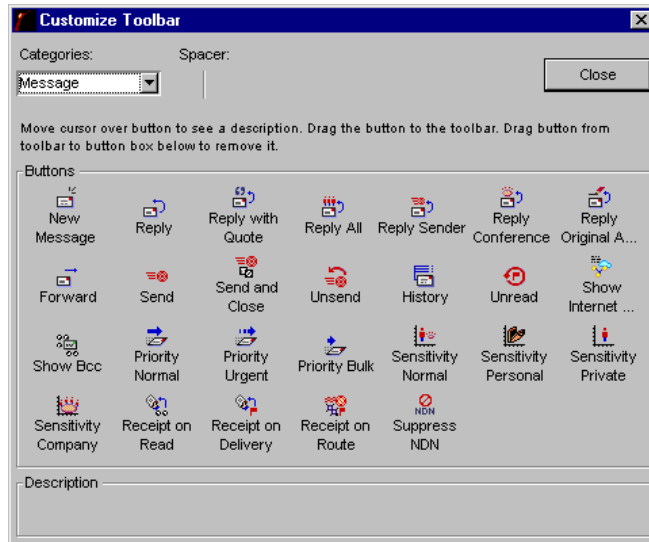
To hide the status bar, choose View > Toolbars > Hide Status Bar.

Adding toolbar buttons

To add a button to a toolbar:

1. Choose View > Toolbars > Customize Toolbar to open the Customize Toolbar screen.

Customize Toolbar screen



2. Locate the button you want by choosing the appropriate category at Categories.

For example, to locate the Clear button, choose Edit.

As for buttons already on the toolbar, you can hover over the buttons in this screen to see the button names pop up. The fuller descriptions are displayed at Description.

3. Drag the button you want to the desired location on the toolbar.

To add a spacer between buttons, drag the spacer symbol under Spacer to the desired location on the toolbar.

4. Click Close.

Changing the order of toolbar buttons

To change the order of buttons on a toolbar:

1. Choose View > Toolbars > Customize Toolbar to open the Customize Toolbar screen.
2. Drag the buttons and spacers on the toolbar to their new locations.
3. Click Close.

5

Removing toolbar buttons

To remove a button from a toolbar:

1. Choose View > Toolbars > Customize Toolbar to open the Customize Toolbar screen.
2. Drag the button from the toolbar to the Buttons section of the Customize Toolbar screen.

You do not need to go to the category that contains this button.

To remove a spacer, drag it from the toolbar to the Spacer section of the Customize Toolbar screen.

3. Click Close.

Changing toolbar position

To change the position of a toolbar, drag the handle at the left side of the toolbar (or at the top, if the toolbar is vertical).

You can drag the toolbar to the top, bottom, left, or right side of the window.

Adding links to a toolbar

You can add link objects to a toolbar. A link object opens an FCIS object (such as a conference, folder, message, or document) or a web page. Link objects are described in “Link objects” on page 213.

To add a link object for an FCIS object to a toolbar, drag the object to the toolbar.

To add a link object for a web page to a toolbar, go to a location that contains a URL link to that web page. You must go to a location with a link to the web page; you cannot go directly to the web page to save a link to it. Drag the URL link to the toolbar.

You can remove link objects from toolbars just as you would toolbar buttons.

Keyboard shortcuts

Menu	Menu item	Windows shortcut	Mac OS shortcut
File	Attach File/Upload	Ctrl+T	Cmd+T
	Close	Ctrl+F4	Cmd+W
	Delete	Ctrl+D	Cmd+D
	Exit/Quit	Alt+Shift+F4	Cmd+Q
	Open Address Book	Ctrl+2	Cmd+2
	Open Bookmarks	Ctrl+3	Cmd+3
	Open Calendar	Ctrl+6	Cmd+6
	Open Desktop	Ctrl+0	Cmd+0
	Open Home Page	Ctrl+4	Cmd+4
	Open Mailbox	Ctrl+1	Cmd+1
	Open Résumé	Ctrl+5	Cmd+5
	Open Selected	Ctrl+O	Cmd+O
	Print	Ctrl+P	Cmd+P
	Properties/Get Info	Alt+Enter	Cmd+I
	Save As	Ctrl+S	Cmd+S
Edit	Check Spelling	Ctrl+Shift+L	Shift+ Cmd+L
	Color Black		Option+ Cmd+K
	Color Blue		Option+ Cmd+B
	Color Brown		Option+ Cmd+W
	Color Gray		Option+ Cmd+E
	Color Green		Option+ Cmd+G
	Color Magenta		Option+ Cmd+M
	Color Orange		Option+ Cmd+O
	Color Red		Option+ Cmd+R

Menu	Menu item	Windows shortcut	Mac OS shortcut
	Color Yellow		Option + Cmd + Y
	Copy	Ctrl + C Ctrl + Ins	Cmd + C
	Cut	Ctrl + X	Cmd + X
	Find	Ctrl + F	Cmd + F
	Find Next	F3	Cmd + G
	Font Larger	Ctrl +]	Cmd +]
	Font Smaller	Ctrl + [Cmd + [
	Format <i>selection</i>	Ctrl + M	Cmd + M
	Insert File	Ctrl + Shift + T	Shift + Cmd + T
	Insert Horizontal Rule	Ctrl + Shift + H	Shift + Cmd + H
	Insert Page Break	Ctrl + Enter Shift + Enter	Shift + Return
	Insert Signature	Ctrl + Shift + S	Shift + Cmd + S
	Paste	Ctrl + V Shift + Ins	Cmd + V
	paste as quoted	Ctrl + Shift + V	Option + Cmd + V
	Redo	Ctrl + Y	Cmd + Y
	Replace	Ctrl + Shift + F	Shift + Cmd + F
	Select All	Ctrl + A	Cmd + A
	Style Bold	Ctrl + Shift + B	Shift + Cmd + B
	Style Italic	Ctrl + Shift + I	Shift + Cmd + I
	Style Plain	Ctrl + Shift + P	Shift + Cmd + P
	Style Quoted	Ctrl + Shift + '	Shift + Cmd + '

Menu	Menu item	Windows shortcut	Mac OS shortcut
	Style Underline	Ctrl+Shift+U	Shift+Cmd+U
	Undo	Ctrl+Z	Cmd+Z
Message	Forward	Ctrl+Shift+=	Shift+Cmd+=
	History	Ctrl+H	Cmd+H
	New Message	Ctrl+N	Cmd+N
	Reply	Ctrl+R	Cmd+R
	Reply with Quote	Ctrl+'	Cmd+'
	Send	Ctrl+E	Cmd+E
	Send and Close	Ctrl+Shift+E	Shift+Cmd+E
	Show/Hide Bcc	Ctrl+B	Cmd+B
	Unread	Ctrl+-	Cmd+-
Conferencing	Approve	Ctrl+'	Cmd+'
	Directory	Ctrl+L	Cmd+L
	Next in Thread	F2	Cmd+/
	Next Unread	Ctrl+U	Cmd+U
	Permissions	Ctrl+;	Cmd+;
	Previous in Thread	Shift+F2	Option+Cmd+/
Connection	Connect/Disconnect	Ctrl+K	Cmd+K
View	Next Window		Cmd+,
	Smart Zoom/Zoom Window	Ctrl+=	Cmd+=
Help	Contents	Shift+F1	

In addition, you can:

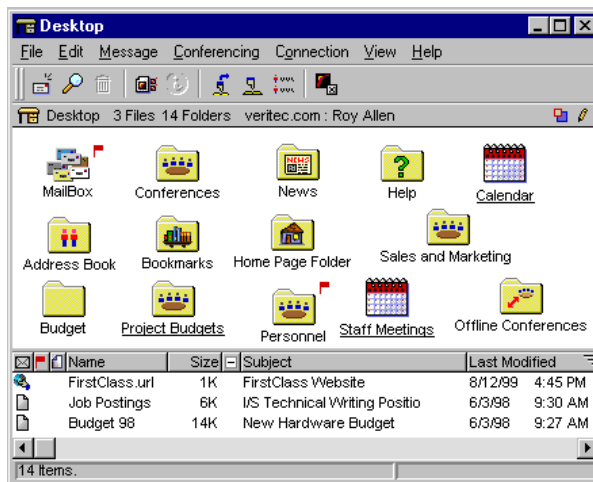
- scroll through a window's contents one screen at a time by pressing Page Up or Page Down
- move between panes by pressing Control (Windows) or Command (Mac OS) and the up or down arrow

- stop activities such as file transfers, searches, or the filling of window contents by pressing Control-Break (Windows) or Command-. (Mac OS).

Working with windows

Once you are connected to an FCIS server, your Desktop opens. It contains your Mailbox plus any conferences, folders, or other objects that you or your administrator have placed on your Desktop.

Desktop (FirstClass)

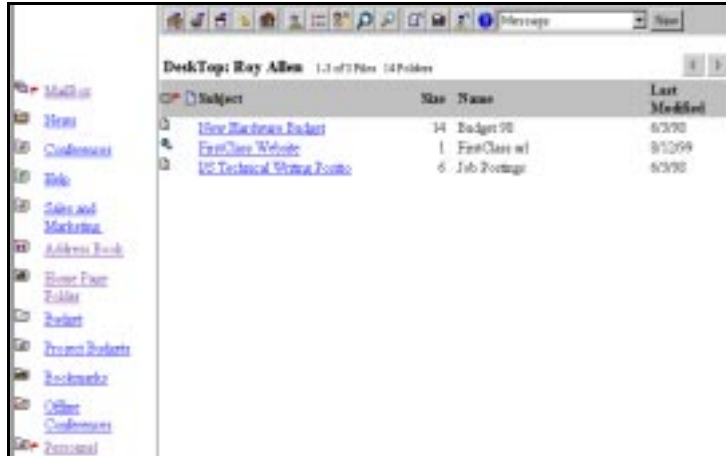


The Desktop shown in our example is a typical FCIS window as seen with the FirstClass Windows client. It has an upper and lower pane divided by a split bar. The contents of the upper pane are displayed by icon, and those of the lower are displayed as a multi-column list. Your Desktop may differ, because both you and your administrator can use FirstClass to customize the way windows look.

Note This book uses the standard upper pane/lower pane look in its examples.

FCIS windows look slightly different when you use a web browser, and you cannot customize these windows in the same way you can with FirstClass. The following is an example of a Desktop as seen when using a web browser:

Desktop (web)



To see a description of web toolbar buttons, click the Help button:

Help button (web)



Navigating windows

Opening windows

To open any object on the Desktop, double-click it (FirstClass) or click it (web). In FirstClass, a new window opens to display this object.

You can also select the object using FirstClass, then choose File > Open > Open Selected.

Going to the Desktop

To see your FirstClass Desktop whenever it is behind other windows or minimized, choose File > Open > Desktop. To see your Desktop on the web, click Desktop.

Going to the Mailbox	To see your FirstClass Mailbox whenever it is behind other windows or minimized, choose File > Open > Mailbox. To see your Mailbox on the web, click Mailbox.
Going to your home location	<p><i>Applies to FirstClass only.</i></p> <p>If you specified a home location, as described in “Connecting directly to a particular window” on page 36, you can go to this window at any time by choosing Connection > Connect to Home Location.</p>
Going to another window	<p><i>Applies to FirstClass only.</i></p> <p>To go directly to a specific window, click the window as you normally do for your operating system (Windows), or choose the window from the View menu (Mac OS).</p>
Going to another active connection	<p><i>Applies to FirstClass only.</i></p> <p>To go to the most recently viewed window in another active connection, choose the server from the Connection menu.</p>
Additional Mac OS navigation	<p><i>Applies to FirstClass only.</i></p> <p>To cycle through all open windows, choose View > Next Window.</p> <p>You can also display windows in ways that make them easy to see or select. To size all open windows so that they do not overlap, choose View > Tile Windows. To stack windows on top of each other with all title bars visible, choose View > Stack Windows.</p>
Additional web browser navigation	<p>To go to the next level up from your current window, click Up one level.</p> <p>To go to the web home page of the server you are connected to, click Home.</p>

Sizing windows

Applies to FirstClass only.

You can size FCIS windows just as you would any other windows. In addition, you can optimize the size of a window so that it just fits the window contents. To do this, choose View > Smart Zoom (Windows) or Zoom Window (Mac OS).

Changing window appearance

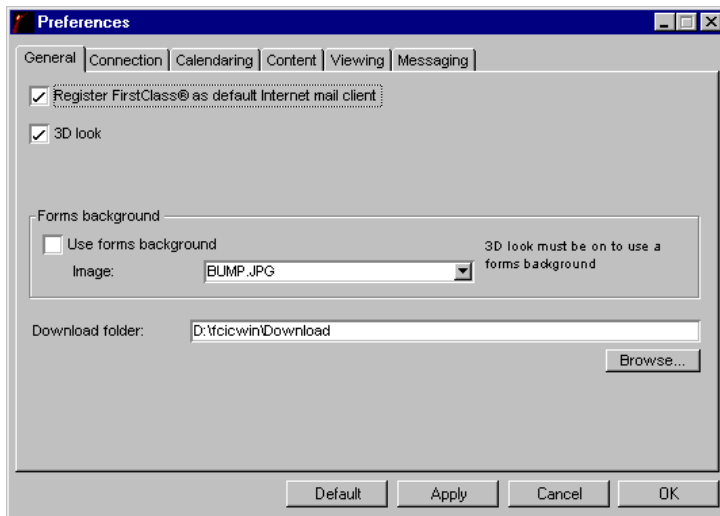
Applies to FirstClass only.

There are a number of ways you can customize the appearance of your windows. Depending on how your administrator has set up the conference or folder you are viewing, your changes may be saved for future sessions, or you may see the default appearance for this window in future sessions.

Except for changing the split bar position, the customization features described in the rest of this chapter involve changing your preferences. To do this:

1. Choose Edit > Preferences to open the Preferences window.

Preferences window



- 2. Click the tab that contains the preference you want to change.
- 3. Make the change, then click OK.

To change a preference without closing the Preferences window, click Apply instead of OK. To make all preferences in this window revert to the FirstClass defaults, click Default.

Note Be cautious about clicking Default. All your preferences will revert to the FirstClass defaults, not just the ones showing on the open tab.

Changing the split bar position

A FirstClass window consists of one or two panes.

When there are two panes, one contains folders and conferences, and the other contains messages, documents, and uploaded files. The panes are divided by a split bar. This bar can be horizontal or vertical. It can also be located at the top, bottom, left, or right of the window, so that you only see one pane.

You can move the split bar by dragging it, or in the following ways:

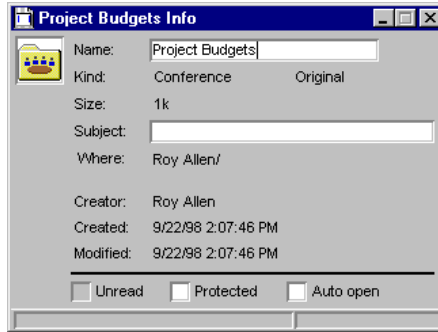
To do this	Choose
make the split bar vertical	View > Split > Split Vertical
make the split bar horizontal	View > Split > Split Horizontal
remove the split bar, so that there is only one pane	View > Split > No Split

If you create a new folder, there is no split bar by default.

Switching between 3D and non-3D

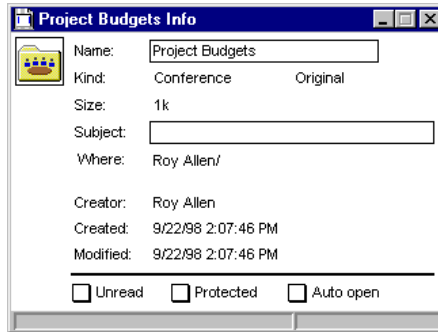
A FirstClass window looks like this in 3D:

3D window



and like this in non-3D:

Non-3D window



To see windows in 3D, select 3D look on the General tab of the Preferences window.

Changing backgrounds

You can apply a background image to certain areas of FirstClass windows, such as:

- toolbars
- column headings
- status bar
- certain dialog boxes.

To do this:

- you must display these windows in 3D

- the images you want must be stored on your server, in the FirstClass Images folder, or in your settings file.

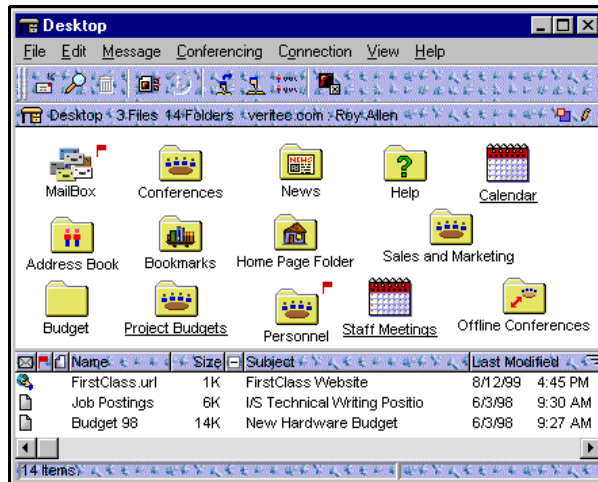
Note To change the background of the data area of your Mailbox, a conference, or a folder, you must make the change on a pane-by-pane basis. For instructions, see “Changing background properties” on page 65.

To apply a background image:

1. Select Use forms background on the General tab of the Preferences window.
2. Choose the image you want at Image.

If you leave this field blank, the default background is used. The following example shows the areas in a window affected by the Use forms background field:

Form background example



Note If you notice that FirstClass is slower after you apply a background image, you may want to remove this image. It takes a little more time to open a window containing an image.

Turning on active scrolling

This only applies to Mac OS.

To make the contents of windows scroll as you drag the scroll box, select Active scrolling on the General tab of the Preferences window.

Changing text magnification

To make text look bigger or smaller when you read messages and documents, type the percent you want to enlarge or reduce text at Text magnification on the Content - Display tab of the Preferences screen. A value less than 100 shrinks text; greater than 100 enlarges text.

This preference only affects the text size as viewed on screen. The original text size is used when messages and documents are printed.

FCIS icons

These are some of the standard icons that you may see in FCIS windows:



your Mailbox



conference



folder



help

This folder usually contains online help, such as instructions on using FirstClass.



news














This conference usually contains general announcements that are considered to be of interest to anyone connecting to this server.



calendar



calendar event

	calendar task
	address book This folder contains your personal e-mail addresses.
	bookmarks This folder contains links to windows you have bookmarked.
	home page This folder contains documents you created for use on the web.
	link object This contains a URL link to a web page or an FCIS server.
	unread flag This red flag indicates that a message, document, or uploaded file is unread.
	unsent flag This hollow flag indicates that a message is unsent.
	attachment This icon appears beside uploaded files and messages with attachments.
	deleted item When you show deleted items, this icon appears beside items that you have marked for deletion.
	regular user This is a user type based on FCIS license arrangements.
	remote user This is a user type based on FCIS license arrangements.
	personal address This is a personal e-mail address that you have added.
	remote name This is a user who is on another server.



gateway

This is software that connects your server with other servers.

If you or your administrator has customized FCIS, you may see different icons for these objects.

Changing the look of a window pane

You can change the look for a pane of your Desktop, Mailbox, a conference, or a folder. Changes made to a window pane affect only that pane. For information on setting preferences that apply to all windows, see “Changing window appearance” on page 56.

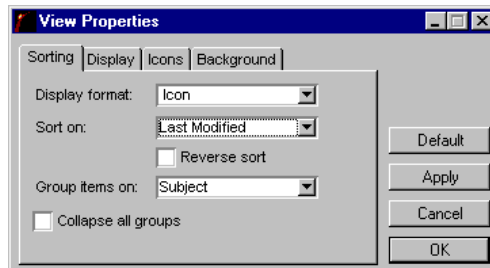
Note Depending on how your administrator set up your user account, and the specific window you are changing, your changes may be permanent or only in effect until you close the window.

**If you are using
FirstClass**

This chapter makes frequent reference to the View Properties window. To use this window:

1. Click the window pane you want to customize.
2. Choose View > Change View Properties to open the View Properties window.

View Properties window



3. Click the tab that contains the property you want to change.
4. Make the change, then click OK.

To change a property without closing the View Properties window, click Apply instead of OK. To make all properties in this window revert to the FirstClass defaults, click Default.

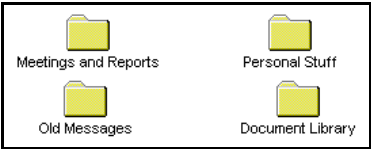
Note Be cautious about clicking Default. All your view properties will revert to the FirstClass defaults, not just the properties showing on the open tab.

Changing the view

Applies to FirstClass only.

You can view the items in a window pane as large icons, small icons, or a multi-column list.

Large icon view



Small icon view



List view

	Name	Size	Subject	Last M
	Personal Stuff	1K		5/22/9
	Meetings and Reports	1K		5/22/9
	Old Messages	1K		5/22/9
	Document Library	1K		5/22/9

Normally, a two-pane window with a horizontal split bar shows items in the upper pane as large icons and items in the lower pane as a list.

To change the view for a pane:

1. Click the pane you want to change.
2. Specify the view you want:

To see this view	Choose this
large icons	View > View by Icon
small icons	View > View by Small Icon
multi-column list	View > View by List

You can also choose the view you want at the Display format field on the Sorting tab of the View Properties window.

Changes you can make in all views

Applies to FirstClass only.

Whether you view a pane by icon or list, you can change the text and background properties.

Changing text properties

To change the text appearance for a pane, fill in the following fields on the Display tab of the View Properties window:

- Font** the font family
- Size** the font size
Default makes the font 10 point in Windows and 9 point in Mac OS.
- Use color** the font color
To use anything other than black, you must select both this field and the color you want.

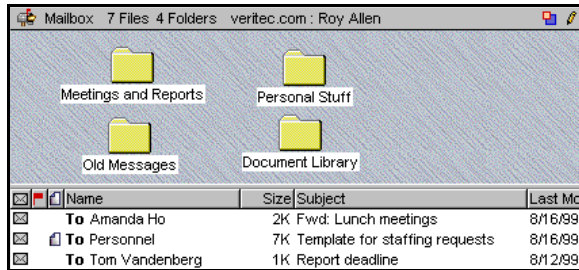
Changing background properties

If you have background images stored on your server, in the FirstClass Images folder, or in your settings file, you can change the background of the data area for a pane. To do this, fill in the following fields on the Background tab of the View Properties window:

- Image** the image you want to use as a background
If you leave this blank, the default background is used.
- Use background picture** uses the image you chose
- Tile background picture** makes the image repeat enough times to fill the pane

The following example shows a top pane with a customized background:

Pane background



Changes you can make in icon views

Applies to FirstClass only.

When you view a pane by large or small icon, you can control the position of icons, their titles, and how to open the conferences and folders they represent.

Moving icons

You can move icons by dragging them. For finer control, press Control-Shift (Windows) or Option (Mac OS) while nudging the selected icon using the arrow keys.

Aligning icons to the grid

In Icon or Small Icon view, you can tidy up the icons by aligning them to an invisible grid. To do this:

1. Click the pane.
2. Choose View > Line Up Icons to Grid.

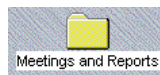
Locking icon positions

To lock icons in position so that they cannot be moved once you have placed them where you want, select Lock icon positions on the Icons tab of the View Properties window.

Blending icon titles with the background

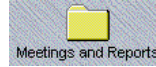
If you apply a background image to a pane, you will notice that icon titles have a white background. As you can see from the example, this is useful for readability when backgrounds are dark or busy:

Icon title with white background



If you do not want this white background, select Transparent text on the Background tab of the View Properties window.

Transparent icon title



Hiding icon titles

If you do not want to see icon titles at all, select Hide icon titles on the Icons tab of the View Properties window.

Changes you can make in List view

In List view, you can change the appearance of the list, and sort and group the information in the list. All of these changes, except reversing sort order, apply to FirstClass only.

Hiding column headings

By default, List view shows headings at the top of each column. If you do not want column headings, clear Show column titles on the Display tab of the View Properties window.

Resizing columns

To change the width of a column, position the cursor over the edge of the column header, then drag the edge to make the column wider or narrower.

Changing column order

To change the order in which columns are displayed, drag column headings to the desired location.

Showing gridlines

To show horizontal gridlines that separate the rows in List view, select Show horizontal gridlines on the Display tab of the View Properties window.

To show vertical gridlines that separate the columns in List view, select Show vertical gridlines on the same tab.

Showing row numbers

To show row numbers to the left of rows in List view, select Show row numbers on the Display tab of the View Properties window.

To reverse row order, click the row numbers column heading.

Sorting by column

In List view, you can specify which column you want to sort on by clicking the appropriate column heading.

For example, this is a Mailbox sorted by subject:

Sort by subject

	Name	Size	Subject	Last
	To Roy Summerville	591K	Annual Report	5/27
	To vWhat's New	1K	Company Picnic	5/6/9
	Administrator	704K	Document you requested	3/23
	To Roy Summerville	1K	Mike Danforth	5/4/9
	To vWhat's New	1K	Re: New FirstClass Server!	5/6/9

and this is the same Mailbox after the Name column heading was clicked:

Sort by name

	Name	Size	Subject	Last
	Administrator	3K	New Settings File	5/25/
	To Amanda Clark	2K	Overdue Account	5/4/9
	To Amanda Clark	2K	Overdue Account	6/24/
	To Company Policy	1K	No smoking legislation	5/7/9

There are a few FirstClass sorting rules to note:

If you sort on this	FirstClass does this
Name	sorts items by the name of the sender (for incoming messages) or receiver (for outgoing messages)
Flag	sorts items in this order: <ul style="list-style-type: none">• unsent messages• urgent incoming messages, by date• normal incoming messages, by date• urgent outgoing messages, by date• normal outgoing messages, by date
Attachment	lists messages that include attachments first

Reversing sort order

To reverse the sort order of the column on which you are sorting, click the column heading.

You can also choose the column you want to sort on, and whether to reverse the sort order, at the Sort on and Reverse sort fields on the Sorting tab of the View Properties window. If you choose None at Sort on, items are listed in the order they were created.

To reverse the sort order so that the newest item is listed first:

FirstClass

1. Choose Edit > Preferences.
2. Select Show items in reverse order on the Viewing tab.
3. Click OK.

Web

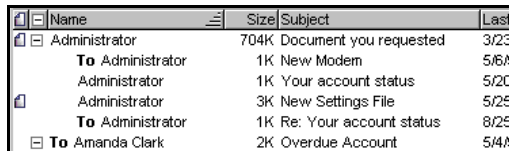
1. Click Preferences, then Preferences again.
2. Choose Yes at Show items in reverse order in the Viewing section.
3. Click Save.

Grouping items

In List view, you can group items just as you can sort them. To group on a column, Control-click (Windows) or Option-click (Mac OS) the column heading of the column you want to group.

For example, this is a Mailbox grouped by name:

Group by name



	Name	Size	Subject	Last
[-]	Administrator	704K	Document you requested	3/23/
	To Administrator	1K	New Modem	5/6/9
	Administrator	1K	Your account status	5/20/
	Administrator	3K	New Settings File	5/25/
	To Administrator	1K	Re: Your account status	8/25/
[+]	To Amanda Clark	2K	Overdue Account	5/4/9

A group column is displayed to the left of the Name column in this example. The group column shows tree view buttons (Windows) or disclosure triangles (Mac OS) beside grouped items. You can use the group column in the following ways:

To	Do this
collapse a group so that you only see the first item in the group	click the button or triangle beside the group
– or –	
expand a collapsed group	
collapse or expand all groups	click the group column heading
remove grouping	Control-click or Option-click the group column heading

There are two FirstClass grouping rules to note:

If you	FirstClass does this
use both sorting and grouping	keeps groups together and sorts the list as a whole by the first item in each group Items are also sorted within each group.
group the Subject column	groups messages by message threads, rather than alphabetically by subject A message thread consists of an initial message and all other messages that reply to it.

You can also use fields on the Sorting tab of the View Properties window to:

- choose the column you want to group (Group items on field)
- collapse or expand all groups (Collapse all groups field).

Using conferences

About conferences

One of the most convenient features of FCIS is conferencing. A conference lets a number of users exchange information online. You can send a public message to a conference just as you would send a private message to another user. You can also open a conference and read the messages posted there by others. This makes a conference an ideal place for ongoing online discussions whenever more than two people are involved. For example, you may have a Budgets conference that is used by all people who are involved in the budgeting process.

A conference automatically keeps all related correspondence in the same place. If you were using private mail instead, messages on a particular topic would be scattered throughout your Mailbox. A conference icon is flagged when the conference contains unread mail, which means you can monitor the conference for unread mail at a glance. You can even make copies of conference icons that are nested within other conferences and place them right on your Desktop, so that you see the conferences as soon as you connect to your server.

Using conferences can also save you maintenance time. Although it is possible to create a mail list for sending multiple messages to the same group of people, you have to create the mail list yourself, and update it as people enter and leave the group. In the case of conferences provided by your administrator, the job of making sure the right people can see your messages is done for you.

Public conferences

Public conferences are created by your administrator. Conferences that are intended for everyone to see are located in a special conference on your Desktop. By default, this conference is called Conferences. If you do not see this conference, ask your administrator for the name of the conference.

Your administrator may also create restricted conferences that are only intended for certain users. You will only see those conferences to which your administrator has given you access by subscribing you. These conferences will appear directly on your Desktop, not within the Conferences conference. If there is another conference that you want to see, ask your administrator to subscribe you to it.

Conference permissions

Your administrator determines what you can do in a public conference by assigning you conference permissions. For example, you may only be able to read messages in a conference that covers personnel policies, but be able to send messages to a conference that deals with a project that you are working on. In this case, the personnel conference serves as a way to broadcast information. The project conference lets everyone involved in the project discuss it.

Personal conferences

You may be able to create your own conferences and give people access to them. These conferences work just like restricted public conferences. For information on personal conferences, see Chapter 9, “Personal conferences”.

Personal conferences

Applies to FirstClass only.

Just as your administrator creates the public conferences that you see in FCIS, you may be able to create your own personal conferences, and grant others permission to use your conferences.

If you have trouble getting your personal conferences to work as you expect, contact your administrator.

Creating a personal conference

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To create a personal conference:

1. Open the location (for example, a conference) where you want the conference.
2. Choose File > New > New Conference.
3. Choose File > Properties (Windows) or Get Info (Mac OS) with the conference selected.
4. Type the conference name at Name.

Shortcut Click the name of the New Conference icon twice to make it editable, type the conference name, then press Tab.

5. *optional*
Type a short description of the conference at Subject.
6. Close the Info window and save your changes.

Setting conference permissions

After you have created a personal conference, you need to specify general conference properties, and give others permission to use your conference. To do this:

1. Choose Conferencing > Permissions with the conference selected.

Permissions form (conference)

2. Fill in the following fields on the Permissions form:

Conference is a member of these groups	Ignore this field; it is used by your administrator when creating public conferences.
Messages require approval	Makes all messages sent to your conference require approval by a moderator, before others can open them.
Attachments require approval	Makes all messages with attachments, and all files uploaded directly to your conference, require approval.

Limit messages above	The maximum size for messages (text plus attachments) posted to your conference. If you do not want to impose a size limit, type zero.
Handling	<i>only applicable if you imposed a size limit on messages</i> Specify how to handle messages that are larger than the size limit you specified: Reject with NDN rejects the message and returns a nondelivery notice to the sender Requires Approval accepts the message, but makes it unapproved Reject Quietly rejects the message and takes no further action.
Expire old messages when number of items reaches	The maximum number of items allowed in your conference. After this maximum is exceeded, FCIS begins to delete the items with the oldest expiry dates.
Default message expiry	The number of days an item can stay in your conference before expiring. The value Default uses the default expiry period for your server.
Form to use	The default form to open when users choose Message > New Message within your conference. If you do not want this Permissions form to dictate the default message form, leave the dash in this field.
Reply preference	The default method for addressing replies to your conference: Reply Sender replies to the sender only Default uses the reply preference set for the group, if this conference is a member of a conference group Automatic used if there is no reply preference set for the conference group.

Use List view layout from server	<p>Makes the sorting and grouping defaults in List view come from the server, rather than the users' view properties.</p> <p>Normally, you leave this field turned off, since you are imposing your defaults on others when it is turned on.</p>								
Who	<p>The names of the users and user groups for whom you want to specify access levels for your conference. To add a name, type it, then press Enter or Return.</p> <p>The order in which you list users and user groups matters. Read the information about access levels below, before deciding the order in which to list these names. When a user opens your conference, FCIS checks this list from the top. When it finds the first occurrence of the user or group to which the user belongs, it uses that access level for the user. This means that if the first thing you list is the All Users group, and make the access level for this group Disallowed, no one will be able to access your conference. For more information on how to set up your conference permissions, contact your administrator.</p> <p>To insert a name, click at the end of the name you want above the inserted name, then press Enter or Return.</p> <p>To remove a name, select it, then press Enter or Return.</p>								
Access	<p>Choose the access level for each user and group you entered at Who. Each level has the permissions of the level before it, plus the permissions described for it:</p> <table><tr><td>Disallowed</td><td>denies access to your conference</td></tr><tr><td>Summary</td><td>can look at the list of conference items, but cannot open them</td></tr><tr><td>Browser</td><td>can open messages</td></tr><tr><td>Reader</td><td>can download attachments, view item histories, and search</td></tr></table>	Disallowed	denies access to your conference	Summary	can look at the list of conference items, but cannot open them	Browser	can open messages	Reader	can download attachments, view item histories, and search
Disallowed	denies access to your conference								
Summary	can look at the list of conference items, but cannot open them								
Browser	can open messages								
Reader	can download attachments, view item histories, and search								

Contributor	can send messages to the conference, delete items they sent, and view this Permissions form
Approver	can read and approve unapproved items
Moderator	can delete any items, move items to subfolders, post messages that exceed the size limit, edit documents and stationery, create and move subfolders, and move subconferences
Creator	can move and resize the conference window, change the conference view and sort order, and create subconferences
Controller	can edit this Permissions form, and edit messages sent by others
Custom	lets you customize the access level by setting individual permissions, as described in “Setting individual permissions”. The names of the users to whom you want to give access to your conference. Enter these names just as you did when adding names at Who. When you subscribe users to your conference, it appears on their Desktops.

List of subscribers

3. Close the Permissions form.

Your changes are saved automatically.

Setting individual permissions

The icons in the Permissions column of the conference’s Permissions form represent individual permissions. The access levels that you can choose at Access are predefined sets of these permissions.

If the predefined access levels are not suitable, you can select individual permissions to create a custom access level. As soon as you select an individual permission, Access changes to Custom.

To see what each permissions icon means, hover the cursor over it. To toggle an individual permission on and off, click the icon.

Note Certain permissions only work if the administrator has given the user authority to perform associated tasks. If a user cannot do something in your conference, and you gave that user permission, tell the user to contact the administrator.

These are the individual permissions from which you can choose:

This permission	Lets users do this within your conference
Edit permissions	edit this Permissions form This includes adding users and groups at Who, and adding users at List of subscribers.
Moderator	approve items in moderated conferences
Delete any item	<ul style="list-style-type: none"> delete any item, including items sent by others move items to folders or subconferences
Create items	<ul style="list-style-type: none"> create documents and folders move items into the conference post oversize messages upload files directly
Edit read-only items	<p>edit items that are not normally editable, such as sent messages</p> <p>For this permission to work, the "Edit items" permission must also be selected. Be cautious about selecting "Edit read-only items", because it overrides normal FCIS operation.</p>
Edit items	<ul style="list-style-type: none"> edit any document modify stationery move folders and subconferences

This permission	Lets users do this within your conference
Save window and view properties	<ul style="list-style-type: none">• change the default position and size of the window• move the default split bar position• change the default view and sort order
Approve items	open and approve unapproved messages Messages sent by users with this permission are automatically approved.
Delete own items	delete and change the properties of their own items
Open conference	open the conference This lets users see the list of items in the conference, but does not allow users to open these items.
Search items	search the conference
Send items	post messages
Open items	open messages and documents
Create subconferences	create subconferences
Download files & attachments	download attached files and files that were uploaded directly to the conference
View permissions	view this Permissions form
View history	view the history of messages

An example of conference permissions

Roy Allen, Amanda Ho, Tom Vandenberg, and Michael Hill are all working on a special budgets project. Roy wants to create a personal conference where they can all exchange information on this topic.

As owner of the conference, Roy wants to control all aspects of it, but he wants Amanda to be able to organize items in the conference into subfolders. Everyone else on the project needs to be able to read messages in the conference and post their own messages.

Roy sets his access levels like this:

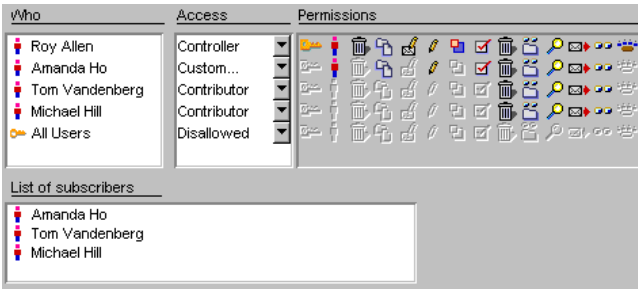
Roy gives this person	This access level	In order to
himself	Controller	do everything within the conference
Amanda Ho	Moderator	create subfolders and move items into them
Tom Vandenberg	Contributor	read and send messages
Michael Hill	Contributor	read and send messages

Roy decides that he does not want Amanda to be able to delete items, so he clicks the "Delete any item" permission icon to turn off this permission. Amanda's access level automatically changes to Custom.

To keep people outside the project from accessing this conference, Roy then adds All Users with a Disallowed access level. By default, everyone belongs to a user group called All Users. Disallowing All Users prevents others from seeing the conference in their Directory.

Finally, Roy lists the other three members of the project at List of subscribers to put the conference icon on their Desktops.

Conference permissions example



Providing information about the conference

You can provide other users with information about your conference by creating a résumé. To do this, open the Permissions form, then click About. For instructions on filling in the résumé, see “Creating your résumé” on page 201.

Updating the conference's Directory entry

To see the Directory entry for your personal conference, open the Permissions form, then click Directory. The Directory entry window shows you the conference name and location. In addition, you can update certain conference information.

Conference Directory entry

The screenshot shows a window titled "Project Budgets" with a "Résumé" tab. Inside, there are labels and text boxes: "Class:" with the value "Conference", "Name:" with "Project Budgets", "Alias:" with an empty text box, and "Where:" with "Roy Allen/". To the right of the "Class:" label is an "Unlisted" checkbox, which is currently unchecked.

To stop this conference from being listed in the Directory, select Unlisted. We recommend that you unlist your personal conferences.

To assign an alias to this conference, type the name at Alias. This is useful for giving a newsgroup name such as alt.business.spreadsheets to conferences that may be posted to by Usenet newsgroups.

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Responding to mailing lists

You can subscribe your conference to an Internet mailing list. When you do this, messages sent to the mailing list will appear in your conference.

Subscribing to mailing lists

Each mailing list has its own instructions for subscribing. In some cases, you send a subscription request and the mailing list returns a reply saying your conference is subscribed. In other cases, you must respond to the mailing list's reply before your conference is subscribed.

To subscribe to a mailing list:

1. Open the Permissions form.
2. Click ListServer Message to open a new message form.

3. Send the subscription request as instructed by the mailing list.

The mailing list will send a reply to your conference.

If you need to respond to this reply:

4. Copy the text of the mailing list's reply.
5. Click ListServer Message in the Permissions form.
6. Paste the copied text into your response.

If necessary, copy and paste the subject line as well.

7. Send the response.

Writing to mailing lists

Some mailing lists let anyone write to them. In this case, you and others using your conference can just send messages to the mailing lists, or respond to mailing list messages in your conference.

Other mailing lists only let registered users write to them. Mailing lists consider your conference to be the registered user, not you or others using your conference. This means that you cannot send messages directly to a mailing list, or respond to mailing list messages directly from your conference. To write to these mailing lists, you must use the ListServer Message button.

Sending commands to mailing lists

As well as sending messages to mailing lists, you can send commands such as help commands or requests for information on who is subscribed. These commands must be sent using the ListServer Message button.

Working with conferences

Some uses for personal conferences

- ✓ Delegate work to another user.

Subscribe the user to your conference, then move messages that you want this user to handle to the conference.

If you simply forwarded messages to your delegate, you would not be able to tell from the message histories whether the messages had been read; message histories would end with you forwarding the messages. By putting the messages in your conference, you can check message histories to see if the messages have been read. Message histories are described in “Checking whether a message has been read” on page 128.

- ✓ Perform collaborative work.

If you give permission to edit posted messages to the people you subscribe to your conference, several people can work on a message in the conference (although only one person at a time can open the message for editing).

- ✓ Send messages under a generic name.

Perhaps you work in a Support department, and you want a message to appear to come from Support rather than from you personally. You can do this by creating a personal conference called Support, then using the ListServer Message button on this conference’s Permissions form to create the message.

If you want multiple users to work on the message, close it without sending it, then drag it from your Mailbox to the conference. Users with edit posted messages permission can then update the message.

- ✓ Provide a form for multiple users to update.

Perhaps you want people to register for a course. To provide a sign-up form for this course, you can post a message to your conference, or create a document there. Users with edit posted messages or edit documents permission can then update the form to sign up.

- ✓ Keep messages indefinitely.

You could remove the expiry dates from messages individually, but it is less work to create a conference with a default message expiry date of Never, then just move messages into this conference. The messages' expiry dates change automatically to the conference default.

- ✓ Set up your own retention schedules.

You could create multiple conferences with different expiry dates to establish a personal records management system.

When you subscribe users to your conference

Before you subscribe people to your conference, let them know. This avoids surprising your subscribers with a new icon on their Desktops.

Approving messages in conferences

This information is only applicable if you have responsibility for approving the messages in a conference.

A conference may be moderated. This means that messages sent to the conference cannot be read until a moderator opens and approves them. Unapproved messages appear in italics in the list of conference items.

To approve a message, select it, then choose Conferencing > Approve.

Working with messages

Reading messages

FCIS lets you work with both public and private messages. Public messages are sent to conferences, where they can be read by anyone who has access to the conferences. Private messages are addressed directly to individuals. Whether messages are public or private, you read and reply to them, and send your own messages, in the same way.

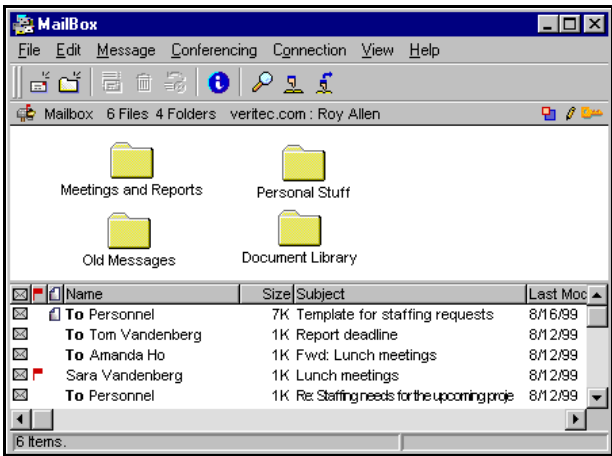
Your FCIS Mailbox

Your FCIS Mailbox is a central repository that contains:

- private messages that have been sent to you
- copies of all public and private messages that you have sent
- unsent messages.

These are examples of typical Mailboxes:

Mailbox (FirstClass)



Opening messages

Mailbox (web)

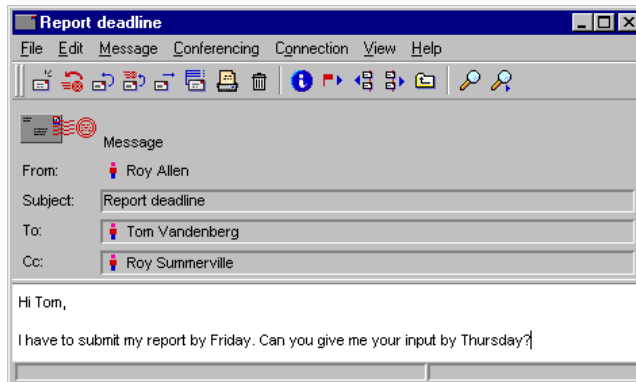


One pane (FirstClass) or frame (web) in these examples show messages. The other shows folders created for organizing mail. Folders are described in more detail in Chapter 29, “Folders”.

Opening messages

To open a message, double-click it (FirstClass) or click it (web).

Message (FirstClass)



Message (web)



The upper portion of a message is called the envelope. It contains addressing information and details about when the message was sent.

Note If you see a conference message in italics, it means that the message has not yet been approved for you to read. You cannot open an unapproved message.

Getting additional information

Applies to FirstClass only.

Getting information about the sender

If the sender of a message is known to FCIS, you can view information about this person. To do this, double-click the sender's name in the envelope. You can view information about other recipients of this message in the same way.

To see who belongs to a mail list, select it, then choose Open User Info Form from the shortcut menu.

Viewing Internet header information

To see header information that describes the route taken by a message received over the Internet, choose Message > Show Internet Header. The header information opens above the message body. To hide header information, choose this menu command again.

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Working with inserted files

An FCIS message can contain files that are inserted directly in the message body. If FCIS supports the file type of an inserted file, the file contents are displayed; otherwise, a placeholder is displayed.

Using a web browser, you can only view inserted files.

Hiding inserted images

When FirstClass is first installed, inserted images are shown by default. You can hide inserted images by default, if you want to speed up the time it takes to open messages. When you hide images, they are indicated by placeholders.

To hide inserted images:

1. Choose Edit > Preferences.
2. Clear Always show images on the Content - Display tab.
3. Click OK.

Showing hidden images

To show all inserted images in a message, choose View > Show Images with the message open.

To show a specific inserted image, click the placeholder, then choose Show Selected from the shortcut menu.

Note The next time you open this message, the images are hidden again.

Opening inserted files

FirstClass cannot display files with unsupported file formats. To see the contents of an inserted file that FirstClass cannot display, select the file, then choose Show Selected from the shortcut menu.

The file is saved to your default download folder, then is opened in the application associated with it. For example, a .cdr file is opened in CorelDRAW, if you have this application.

Saving inserted files

To save an inserted file to your computer:

1. Click the inserted file.
2. Choose File > Save Selected.
3. Select the folder where you want the file to be saved.
4. Click Save.

The file is saved in the format in which it was inserted.

Opening specific messages

Opening messages sequentially

Applies to FirstClass only.

To open the next message in your Mailbox, choose Conferencing > Navigation > Next Item. To open the previous message, choose Conferencing > Navigation > Previous Item.

Opening only unread messages

To open the next unread message in your Mailbox, choose Conferencing > Navigation > Next Unread (FirstClass) or click Next Unread (web). To open the previous unread message, choose Conferencing > Navigation > Previous Unread (FirstClass) or click Previous Unread (web).

Turning unread flags off and on

Applies to FirstClass only.

When a message is unread, a red flag is displayed beside it. You will also see a red flag beside the icon for your Mailbox or a conference that contains unread messages.

After you open an unread message, the red flag beside the message disappears. If you want this message to attract your attention in the future, you may be able to put the flag back. To do this, choose Message > Unread.

Shortcut Control-click (Windows) or Option-click (Mac OS) the message in the flag column.

To toggle the flag back off, do the same thing.

If you select a block of mixed read and unread messages, then choose Message > Unread, only the unread messages are affected; their flags are removed.

Removing all unread flags

To remove all unread flags in your Mailbox or a conference, select the appropriate icon on your Desktop, then choose Message > Unread.

If you choose Message > Unread again while the icon is selected, all messages that were sent to you are marked as unread, not just the ones that were originally unread.

Showing only unread messages

You can tell FirstClass to show only unread messages in your Mailbox or a conference. This can be useful for cutting down the time it takes to see the list of messages when you connect by modem.

When you show only unread messages:

- the number of read messages not displayed is indicated on the summary bar (where they are referred to as hidden messages)
- you will still see all messages that you sent in your Mailbox.

To show only unread messages:

FirstClass

1. Choose Edit > Preferences.
2. Select Show only unread items on the Viewing tab.
3. Click OK.

Web

1. Click Preferences, then Preferences again.
2. Choose Yes at Show only unread items in the Viewing section.
3. Click Save.

Dealing with junk mail

FCIS can block certain types of mail automatically on the assumption that it is unsolicited e-mail, often called junk mail. You can decide whether to accept or reject this mail.

Note In addition, your administrator may have defined other mail as junk, such as mail coming from a particular address. You will not see this mail.

To specify how to handle the mail that FCIS considers junk:

FirstClass

1. Choose Edit > Preferences.
2. Choose the option you want at Junk mail handling on the Messaging - Mail Rules tab.

The value Accept accepts junk mail. Delete Silently deletes junk mail as it is received.

3. Click OK.

Web

1. Click Preferences, then Preferences again.
2. Choose the option you want at Junk mail handling in the Messaging - Mail Rules section.

The value Accept accepts junk mail. Delete Silently deletes junk mail as it is received.

3. Click Save.

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Printing messages

Printing using FirstClass To print a message, select or open it, then choose File > Print.

If you selected an unopened message, you are asked whether you want to print the selected message or the list of items in the window.

To set up your printer options, choose File > Print Setup (Windows) or Page Setup (Mac OS). This opens the standard Print Setup/Page Setup dialog box.

Printing using a web browser

To print a message using a web browser, use your browser's standard print feature.

Saving messages

Applies to FirstClass only.

Normally, messages expire after a certain number of days, and are removed from your Mailbox or a conference. If you have the authority, you can change a message's expiry date so that it will expire much later, or never expire.

You can also save a message as a plain text file on your computer. This not only saves the message contents, but makes the information usable by other applications, such as a word processor. Because the message is saved in plain text, any formatting is lost.

Changing the expiry date

To change the expiry date of a message:

1. Select the message.
2. Choose File > Properties (Windows) or Get Info (Mac OS).
3. Choose the expiry period at Expiry period.

The value Default represents the number of days defined by your administrator as the default expiry period.

If you choose Other, enter the number of days you want as an expiry period at Days left. This information is ignored for all other expiry period choices.

4. Close the Info window and save your changes.

Saving messages as text files

To save a message as a text file, open it, then choose File > Save As. You must open the message, rather than just selecting it, or the list containing the message will be saved instead. Save the file just as you would any other file.

Creating new messages

FirstClass includes several message forms that you can use when you send messages. The icon associated with a message reflects the message form used to create the message.

These are the steps involved in sending a message:

- start the message by opening a copy of the message form you want to use

When you open a message form, a copy of the message is placed in your Mailbox.

- fill in the addressing information in the envelope
- type the body of the message
- send the message.

This chapter describes how to open a message form. The chapters immediately following describe the other steps in sending a message.

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What happens when you create a message

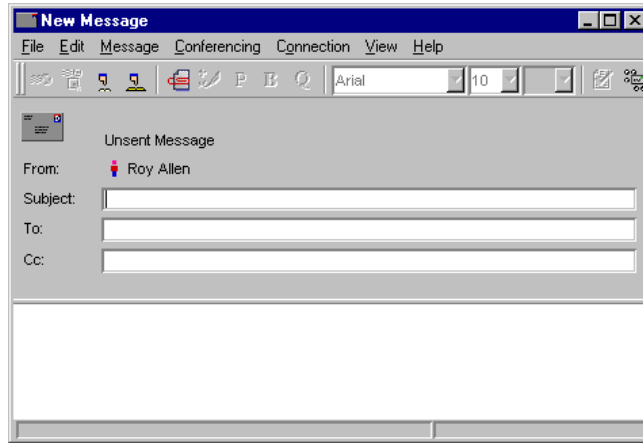
When you send a message to several people, only one copy of the message is created. It is stored on the server, and pointers to it are stored in your Mailbox and the Mailboxes of all recipients.

You can change the properties of your own pointer, or even delete it, without affecting the pointers in others' Mailboxes. The actual message stays on the server as long as there are any pointers to it.

Creating a standard message

The standard FirstClass message form looks like this:

Standard message form (FirstClass)

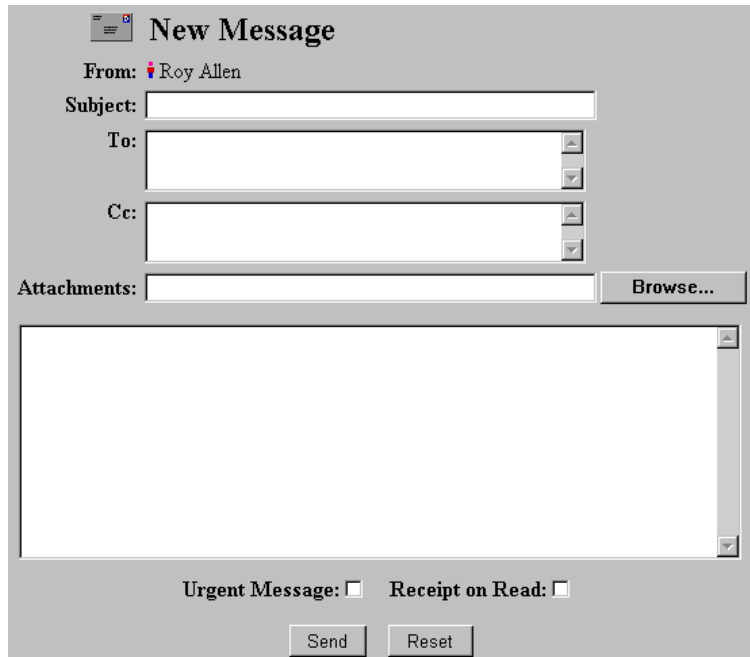


The screenshot shows a window titled "New Message" with a menu bar (File, Edit, Message, Conferencing, Connection, View, Help) and a toolbar with icons for file operations and text formatting. The main area is labeled "Unsent Message" and contains fields for "From:" (filled with "Roy Allen"), "Subject:", "To:", and "Cc:". Below these is a large text area for the message body.

To open a copy of this form, choose Message > New Message.

The standard web message form looks like this:

Standard message form (web)



The screenshot shows a web-based "New Message" form. It includes fields for "From:" (filled with "Roy Allen"), "Subject:", "To:", and "Cc:". There is an "Attachments:" field with a "Browse..." button. Below these is a large text area for the message body. At the bottom, there are checkboxes for "Urgent Message:" and "Receipt on Read:", and "Send" and "Reset" buttons.

To open a copy of this form, click New. If you do not see this button, click New Message.

Other message forms

FCIS includes a number of specialized message forms as well as the standard message form. In addition, your administrator may create customized message forms.

Opening another message form (FirstClass)

To open a copy of one of these forms using FirstClass, choose Message > New Message Special, then the appropriate form. You can use this method to preview the forms; simply choose File > Delete if you do not want to use the form to send a message.

Opening another message form (web)

To open a copy of one of these forms using a web browser, click the Message dropdown field, choose the form you want, then click New. If you do not see the Message field, go to a page that contains it, such as your Desktop or Mailbox.

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Stationery pads

Applies to FirstClass only.

Your administrator may have created message forms as stationery pads. A stationery pad acts just like a paper pad of message forms; you "tear one off" and fill it out. Normally, a stationery form is partially filled out, often with the address to which the message will be sent. Depending on how your administrator set up the stationery pad, you may not be able to change information in the prefilled fields.

Stationery pads appear in the top pane, and look something like this:

Stationery pad



Using a stationery pad:

To use a stationery pad:

1. Double-click the pad to open the message form.
2. Fill in the missing information in the form and send it as you would any other message.

Personal stationery

Applies to FirstClass only.

You can create personal stationery that works like the stationery pads created by your administrator. If you send a lot of messages with common information, such as messages addressed to the same person or conference, or on the same subject, you will find personal stationery a convenient shortcut when creating these messages.

Creating personal stationery

To create personal stationery:

1. Open your Mailbox.
2. Create a new message, using whichever message form you want, and fill in any fields you want prefilled.

You can also use a sent message as the basis for your stationery.

3. Close the message without sending it.
4. Choose File > Properties (Windows) or Get Info (Mac OS) with the message selected.
5. Select Stationery.
6. Close the Info window and save your change.

An icon for the stationery is placed in the top pane of your Mailbox.

Using personal stationery

To use personal stationery:

1. Double-click the stationery icon to open the message form.

2. Fill in the missing information in the form and send it as you would any other message.

Changing personal stationery

To change personal stationery:

1. Click the stationery icon.
2. Choose File > Properties (Windows) or Get Info (Mac OS).
3. Clear Stationery and Protected.
4. Close the Info window and save your changes.
5. Double-click the stationery icon to open the message form.
6. Change the information in this form as required.
7. Close the message without sending it.
8. Open the Info window again, select Stationery, then close and save your change.

Addressing messages

To address a message, you fill in the fields in the message envelope:

Message envelope

From This field is automatically filled in with your name.

Subject Type a subject for your message.

To Enter the names of the recipients. To add another recipient, press Enter or Return. To move to the Cc field when using FirstClass, press Tab.

Cc Enter the names of any recipients you want copied on this message.

Bcc *applies to FirstClass only*

This field is not initially visible to a message creator, and is never visible to the To and Cc recipients. It allows you to copy people without your other recipients being aware of these copies.

To show the Bcc field, choose Message > Show Bcc. You can hide this field while editing the message by choosing Message > Hide Bcc.

Note If you are using a web browser, FCIS does not check whether your recipients' names are valid when you enter them.

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You can also enter recipient names by using the FCIS Directory, or by clicking and dragging names as described in “Addressing messages by clicking or dragging” on page 108.

You can address a message to a conference by opening the conference, then creating the message. The message is automatically addressed to the conference.

The FCIS Directory

The Directory on your FCIS server contains a list of addresses for:

- all local users

For example, if your office has one FCIS server, all users in your office who are registered on your server are listed.

- users outside your office who are registered on your server
- personal contacts and mail lists created by you

Users only see the personal information that they added. For information on adding personal information, see Chapter 18, “Saving addresses for future use”.

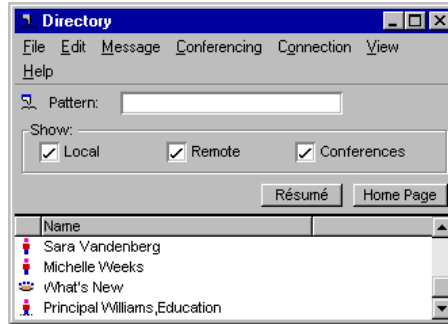
- conferences, gateways, and calendars known to the server.

Note Some Directory entries may not be visible to you because your administrator can customize your view of the Directory. In addition, any entries defined as unlisted do not appear in the Directory. Entries in italics will not accept chat invitations.

Opening the Directory (FirstClass)

To open the Directory using FirstClass, choose Conferencing > Directory.

Directory (FirstClass)

*Narrowing the list*

You can narrow the Directory list by:

- requesting only certain categories
- requesting only names that match a search pattern.

The Directory provides checkboxes for three categories: local users (regular users who are on your server), remote names, and conferences. To list only one or two of these categories, clear Local, Remote, or Conferences as appropriate.

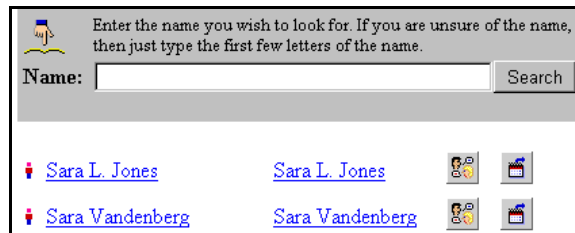
To list only names that match a search pattern, type the search pattern at Pattern. For example, to list only those entries with a first or last name of Alan, type something like al. To find the entry for Alan Grady, type the entire name or something like al gr.

Tip You can open a shortcut menu from a user's name that lets you view user information, send a message to the user, and so on.

Opening the Directory (web)

To open the Directory using a web browser, click Directory.

Directory (web)



Listing names

The Directory does not list any names until you click Search. To list all names in the Directory, leave Name blank. To list only names containing certain characters, type the characters at Name, then click Search.

Viewing additional information

You can view a Directory entry's résumé or home page. Both may provide additional information about the entry. Résumés and home pages are described in Chapter 28, "Providing information about yourself".

In FirstClass, open a résumé by selecting the entry, then clicking Résumé. Open a home page by clicking Home Page. If the user has not created a home page, you will see the résumé.

Note If you have the authority to edit user information, you will see the user's information form instead of the résumé.

Using a web browser, you can open either a résumé or home page by clicking the entry's name (the first column), if the name is a link. Where a home page exists, that is what you see; otherwise, you see the résumé.

Addressing messages to recipients in the Directory

If your recipient is listed in the Directory, you can use the Directory to address messages both in FirstClass and through a web browser.

Using the Directory (FirstClass)

To specify a recipient who is in the Directory:

- type the recipient's full name or part of the name
 - or –
- choose Conferencing > Directory.

If you type a partial name, and it is unique in the Directory, the rest of the name is filled in for you after you press Tab, Enter, or Return. If the partial name is not unique, the Directory opens with a list of all names that match.

From the Directory, select the name you want, then click To, Cc, or Bcc to put the name in the appropriate field in the message. These buttons are only displayed when you open the Directory from a new message.

Shortcut Drag a name from the Directory to the appropriate field in your new message.

Using the Directory (web)

To specify a recipient who is in the Directory:

- type the recipient's full name
- or –
- click Directory, then list the recipient you want.

Click the address (the second column) of the recipient to open a new message that is addressed to that recipient. You can only use this method to add one name to the To field.

Note Your administrator may not permit you to read or contribute to conferences when you are using a web browser.

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Addressing messages to recipients outside your system

People and conferences not listed in the Directory are considered to be outside your system. They may be registered on another FCIS server or a system that is connected to your server through special communications software (a gateway), or at e-mail addresses that you access over the Internet.

Recipients connected by gateways

To specify a recipient who is connected to your server through a gateway, type the address in the format
recipient's name,gateway name

The recipient's name is the user name or address of the recipient as defined on the other system. The gateway name is the name used by the other system. For information on the gateways to which you can address messages, contact your administrator.

Note FCIS does not check whether this type of address is valid.

Addressing messages by clicking or dragging

Example of a gateway address

To send a message to Amanda Ho through the Veritec Toronto gateway, type
Amanda Ho,Veritec Toronto

Internet addresses

To specify a recipient when the message will go over the Internet, type the recipient's e-mail address (for example, andrea_farnham@avalon.com). FCIS recognizes any address containing @ as an Internet address.

Addressing messages by clicking or dragging

Applies to FirstClass only.

If the recipient's address is in another message or document, or in an external file such as a Word document, you can click or drag the address to put it in your message.

Addresses in FirstClass messages or documents

To use an address from an existing message or document, drag it to the appropriate field of your new message.

For addresses in the body of a message or document that are formatted as links, you can create a new standard message addressed to one of these addresses by clicking the link. For more information on links, see "URL links in messages and documents" on page 212.

If you are using a web browser, you can click a name in the envelope of a sent message to create a new message addressed to this person.

Addresses in external files

To use an address from an external file such as a Word document, select the address, then Control-drag (Windows) or drag (Mac OS) it to the appropriate field in your new message.

Removing recipients

To remove someone from the list of recipients, select them, then press Delete. If you are using FirstClass, press Tab to completely clear the line.

Changing the message icon

Applies to FirstClass only.

To change the icon that is associated with this message, click the default icon in the upper left corner, then choose an icon from the popup menu.

Changing the message icon

Adding message content

To type your message using FirstClass, click in the bottom section of the message. You can:

- use standard editing functions such as copy, cut, and paste
- format and spell check your message text
- insert the contents of files
- insert images.

FCIS saves your message at intervals as you type it. If there is a connection problem, such as a communications or power failure, your message as last saved will be preserved in your Mailbox as an unsent message.

To type your message using a web browser, click in the body section of the message, then type your text.

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Using existing content

Applies to FirstClass only.

Moving and copying

To move content (such as text or an image) from one place in your message to another, select it, then drag it to the desired location. If you press Control (Windows) or Option (Mac OS) as you drag, you will copy the content instead of moving it.

Using content from other sources

To copy content from another message, a document, or an external file from another application, select it, then Control-drag (Windows) or Option-drag (Mac OS) the text to your new message.

To control the format in which FirstClass pastes content from the clipboard, choose Edit > Paste Special, then choose the format you want and click OK.

Note If you just drag content from an unsent message, a document which you are allowed to edit, or an external file, you will move it instead of copying it.

Inserting a file

You can insert text files, image files, or files that contain both text and images. For more information on inserting images, see “Inserting images” on page 119.

To copy the entire contents of a file and insert them into your message:

1. Click in the message body where you want the file contents to appear.
2. Choose Edit > Insert > Insert File.
3. Select the file you want to insert.
4. Click Open.

Note If FirstClass supports the file type, the contents are displayed in your message. If the file type is not supported, a placeholder is displayed. Recipients can save inserted files and view them with the appropriate application.

Formatting message text

Applies to FirstClass only.

FirstClass works in a similar manner to most word processing software. To format a block of text, select it, then choose the appropriate formatting command.

Selecting text

To select a single word, double-click it. To select a whole paragraph, triple-click it. To select the entire body of the message, choose Edit > Select All.

Changing text formatting

To change the font of selected text, choose Edit > Font, then the font you want.

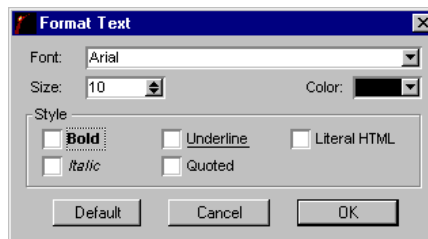
To change the size of selected text, choose Edit > Size, then the size you want. Smaller makes the size one point smaller; Larger makes it one point larger. On the Mac OS, Other lets you specify a font size not included in the menu. In all versions of FirstClass, you can do the same thing using the Font Size control on the toolbar.

To change the style of selected text, choose Edit > Style, then the style you want. You can use these styles in combination. Plain returns the selected text to the default format. Literal HTML is used when you are creating content for your home page, as described in “Creating a home page” on page 203.

To change the color of selected text, choose Edit > Color, then the color you want. Choose Other Color to see more colors or create custom colors.

To make a combination of formatting changes at once, choose Edit > Format Text.

Format Text dialog box



As you make changes, they are previewed in your message. To revert to the formatting specified in your preferences, click Default. To revert to the original formatting, click Cancel. Formatting preferences are described in “Specifying the default format” on page 114.

When you are finished formatting text, click OK to make your changes permanent.

Undoing text editing changes

Applies to FirstClass only.

Immediately after you have made a change in the body of a message, you can undo it by choosing Edit > Undo. The number of changes you can undo is limited by your preferences. Choosing a higher number makes editing more convenient, but may limit the amount of memory available on your computer.

To change this number:

1. Choose Edit > Preferences.
2. Enter the number of changes you want to be able to undo at Maximum undoable edits on the Content - Editing tab.
3. Click OK.

Redoing text editing

To redo editing that you have just undone, choose Edit > Redo.

Specifying the default format

Applies to FirstClass only.

Whenever you create a new message or document, FirstClass uses your preferences to set the default text formatting. To change these defaults:

1. Choose Edit > Preferences.
2. Specify the font, size, and color that you want as your defaults at Default text style on the Content - Editing tab.
3. Click OK.

Spell checking message text

Applies to FirstClass only.

To check the spelling of a message before sending it, choose Edit > Check Spelling with the message open. To spell check only

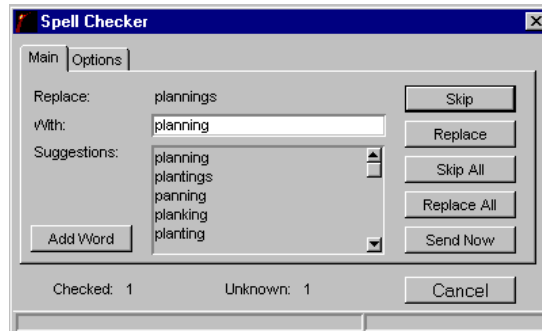
part of the message text, select that part before choosing this command.

FirstClass checks spelling based on the preferences described in “Specifying spell checking preferences” on page 116.

Hyphenated words are checked as separate words.

If FirstClass encounters a word it does not know, it opens the Spell Checker dialog box. This dialog box contains choices for handling the word.

Spell Checker dialog box



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Click one of the following:

- Skip** leaves this occurrence of the word as is
- Skip All** leaves all occurrences of the word as they are
- Replace** replaces this occurrence of the word with the word in the With field
You can accept the word shown in this field, type a new word, or click a suggested word to put it in the field.
- Replace All** replaces all occurrences of the word with the word in the With field
- Add Word** adds the unknown word to the spell checker dictionary
- Send Now** *only displayed if your preferences tell FirstClass to spell check messages automatically when you send them*
stops spell checking and sends the message immediately

Note The Options tab of the Spell Checker dialog box contains your spell checking preferences. You can change these preferences on this tab. When you click Save, your preferences are updated for the rest of this spell checking session and for all future spell checks.

Specifying spell checking preferences

To change your spell checking preferences:

1. Choose Edit > Preferences.
2. Select the preferences you want on the Content - Editing tab:

Ignore quoted text	does not spell check text that is in quoted style
Ignore URLs	does not spell check text that is part of an Internet address or URL This text commonly contains @ or ://.
Split contracted words	checks each part of a contracted word separately This is useful for checking languages such as French (words like "l'arbre").
Enable suggestions	lists suggested alternatives for unknown words Spell checking runs faster without this turned on.
Ignore words with numbers	does not spell check words that contain numbers (such as 3D)
Ignore words in UPPERCASE	does not spell check words that are all capitals (such as CD)
Split compound words	checks each part of a compound word separately This is useful for checking languages, such as German, that contain many compound words.
Automatically check on send	starts spell checking automatically when you send messages
3. Click OK.

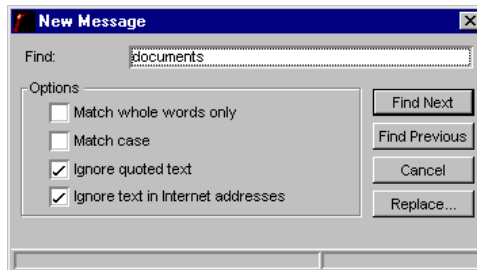
Searching for text

Note This information applies to FirstClass. If you are using a web browser, use your browser's standard find feature.

You can search for specific text in your messages. To do this:

1. Open the message you want to search.
2. Choose Edit > Find.

Find dialog box



3. Type the text you want to find at Find.
4. Select the appropriate options:

Match whole words only	retrieves only complete words The search text sun will not retrieve sunshine.
Match case	retrieves only text that matches the capitalization of your search text
Ignore quoted text	does not retrieve text that is in quoted style
Ignore text in Internet addresses	does not retrieve text that is part of an Internet address or URL This text commonly contains @ or ://.
5. Click Find Next to search forward, or Find Previous to search backward.

FirstClass scrolls to the first occurrence it finds of your text and highlights it.

6. Continue clicking Find Next or Find Previous until None found is displayed in the find dialog box.
7. Click Cancel to close the find dialog box.

Replacing text

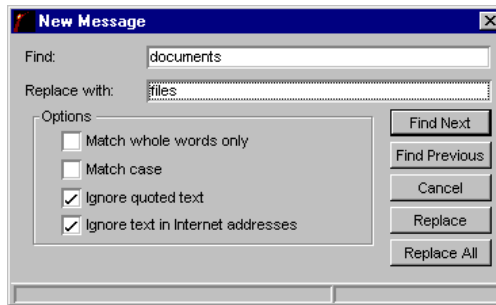
Applies to FirstClass only.

You can replace all occurrences of specific text in your messages with new text. To do this:

1. Open the message you want to update.
2. Choose Edit > Replace.

Note If you have the find dialog box open, you can just click Replace.

Replace dialog box



3. Type the text you want to replace at Find.
4. Type the text you want in its place at Replace with.
5. Select the appropriate options:
 - Match whole words only** replaces only complete words
The new text sun will not replace sunshine.
 - Match case** replaces only text that matches the capitalization of your old text
 - Ignore quoted text** does not replace text that is in quoted style text

Ignore text in Internet addresses does not replace text that is part of an Internet address or URL
This text commonly contains @ or ://.

6. Click Replace All to replace all occurrences of the old text automatically.

– or –

Click Find Next or Find Previous to find the first occurrence of the old text, then click Replace to replace this text, or Find Next/Find Previous again to skip this text.

None found is displayed in the dialog box when there are no more occurrences of the old text.

7. Click Cancel when you are finished with this dialog box.

Inserting images

Applies to FirstClass only.

You may be able to insert image files into message bodies. If someone reading your message has a client that does not support your image format, a placeholder will be displayed instead, and the image file will appear as an attachment.

To insert an image into your message:

1. Click in the message body where you want the image to appear.
2. Choose Edit > Insert > Insert File.
3. Select the file you want to insert, then click Open.

Shortcut Drag an image file to the message body. If the image has been copied to the clipboard, you can also paste it into your message by choosing Edit > Paste or Paste Special.

How images are inserted The file format of an inserted image depends on how you inserted the image:

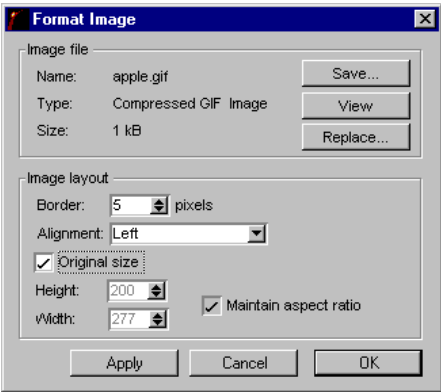
If you did this	The image file format is
chose Insert File	the same format as the original
dragged the image to the message body	the same format as the original
chose Paste	the best format as determined by FirstClass (often .png)
chose Paste Special	the format chosen by you when you pasted the image

Changing image properties

To change properties such as the size of an inserted image:

- 1. Select the image by clicking it.
- 2. Choose Edit > Format Image.

Format Image dialog box



- 3. Fill in the following fields as required:
 - Border** the number of pixels of blank space surrounding the image
 - Alignment** choose one of the following:
 - Right** aligns the image to the right
Text wraps to the left of the image.
 - Left** aligns the image to the left
Text wraps to the right of the image.

	Inline Top	aligns the top of the image with the top of the text line; the image flows with the text
	Inline Bottom	aligns the bottom of the image with the text baseline; the image flows with the text
	Inline Center	centers the image vertically on the text line; the image flows with the text
Original size		makes the image the same size as the original
Height		the height of the image in pixels
Width		the width of the image in pixels
Maintain aspect ratio		makes the image the same relative dimensions as the original
		If you select this, then change either the height or width, the other dimension will change automatically.

You can also click the following:

Save	saves the image file to your computer
View	displays the image file in its own window
Replace	lets you replace the image file with another file
Apply	lets you preview your changes without closing this dialog box

4. Click OK.

Inserting horizontal rules

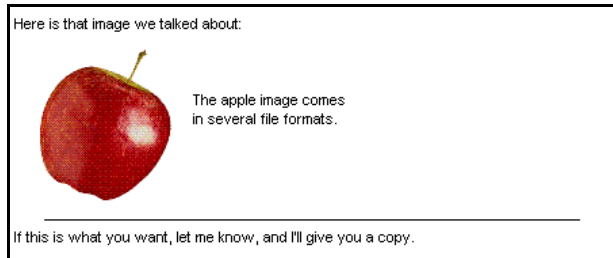
Applies to FirstClass only.

You can insert a horizontal rule to visually break up message content. To do this, choose Edit > Insert > Insert Horizontal Rule. A horizontal line is drawn below the current cursor position, and the cursor and any subsequent content drop below this line.

Horizontal rules are useful for moving below inserted images. When you insert an image, the cursor is placed right after the image (for example, to the right of a left-aligned image). You

can type text at this location, or start your text below the image, at the left margin. A horizontal rule is a convenient way to move below the image without entering multiple paragraph breaks.

Horizontal rule

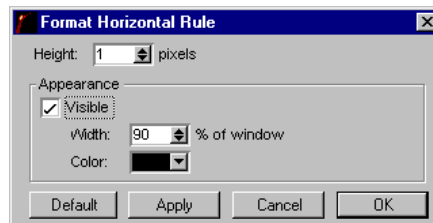


Formatting horizontal rules

To change the appearance of a horizontal rule:

1. Select the horizontal rule.
2. Choose Edit > Format Horizontal Rule.

Format Horizontal Rule dialog box



3. Fill in the following fields as required:
 - Height** the rule thickness
 - Visible** clear this field if you do not want the rule to show
 - Width** the percentage of the window width filled by the rule
This determines the gaps at the left and right sides.
 - Color** the color of the rule
4. Click OK.

Adding a signature

When you create a new message, you can add a signature to the bottom of the message body. Signatures are used to repeat your name, indicate your title or e-mail address, or even cite a favorite quote.

Creating a signature

To create your signature text:

FirstClass

1. Choose Edit > Preferences.
2. Type your signature text at Signature text on the Messaging - Signature tab.
3. *to add your signature automatically to all new messages*
Select Automatically add signature to new messages.
4. Click OK.

Web

1. Click Preferences, then Preferences again.
2. Choose Yes at Automatically add signature to new messages in the Signature section.
3. Type your signature text at Signature text.
4. Click Save.

Adding a signature manually

Applies to FirstClass only.

If you do not tell FirstClass to automatically add your signature text to the bottom of all new messages, you can add this text to an individual message by choosing Edit > Insert > Insert Signature.

Online etiquette

Remember that the readers of your messages cannot see your facial expressions or body language. In the case of public messages sent to conferences, you do not always know who your readers will be.

To avoid offending your readers, keep these rules of online etiquette in mind when composing a message:

- ✓ Make your subject clear. It is the only information about a message's contents that others can see without opening the message.
- ✓ Do not send a message with a priority of urgent unless the situation really calls for this.
- ✓ Use mixed case for ease of reading, and avoid using all uppercase. All uppercase is not only hard to read, but is often considered shouting.
- ✓ Avoid huge signatures.
- ✓ Make the message short and to the point.
- ✓ Quote or rephrase when replying, to make the context clear, but avoid unnecessarily long quotes.
- ✓ Acknowledge quotes, and respect copyrights and license agreements.
- ✓ Respect e-mail confidentiality.
- ✓ Avoid jargon. Keep international readers, who may only have a basic understanding of your language, in mind.
- ✓ Write prudently and politely, as if all messages were public:
 - ask yourself if you would say this to the person's face
 - avoid sarcasm and irony; irony can be misinterpreted without visual cues
 - calm down before responding to a message that has offended you
 - read your message twice before sending it.

Sending messages

After you have addressed your message and typed the message text, you are ready to send it. If you are using FirstClass, you can request special message handling, as described in this chapter, before you send the message.

In FirstClass, to send your message and leave the message open, choose Message > Send. To send the message and close it, choose Message > Send and Close.

If you are using a web browser, send your message by clicking Send.

After you send a message, FCIS adds a postmark icon to the message envelope.

Sending messages later (FirstClass)

To close a message and leave it unsent, just close the message window. The message stays in your Mailbox with an unsent flag beside it. You can open this message later to update and then send it, or just select it in your Mailbox and send it. If you do not want the message in your Mailbox, delete it while it is still open.

Unsending messages

In certain circumstances, you can unsend a message. This makes the message disappear from the Mailbox or conference to which you sent it.

Note Be aware that the message may have already been read. For instructions on checking whether the message has been read, see “Checking whether a message has been read” on page 128.

You cannot unsend a message that was:

- sent through the Internet or a gateway
- moved into a folder or deleted by the recipient.

To unsend a message that you sent to a conference, use the copy of the message that is in your Mailbox. You cannot unsend a message directly from the conference.

To unsend a message in FirstClass, select it, then choose Message > Unsend.

To unsend a message using a web browser, open the message, then click Unsend.

An unsend flag is displayed beside the message in your Mailbox.

Special message handling

FirstClass lets you:

- change the priority with which a message is sent
- request notification of message receipt
- prevent generation of nondelivery notices
- set message sensitivity.

A web browser lets you:

- change the priority of a message to Urgent
- request notification when a message is read.

Changing message priority

By default, all messages are assigned a Normal priority. You can change this priority to Urgent (FirstClass or web) or Bulk (FirstClass only).

Urgent priority causes the message to appear in bold in the recipient's Mailbox or the conference. Where applicable, it also invokes special gateway handling. To change the priority to Urgent, choose Message > Priority > Priority Urgent (FirstClass) or select Urgent message (web).

Bulk priority is used by some gateways for low priority mail. Check with your administrator to see if this option is useful to

you. To change the priority to Bulk, choose Message > Priority > Priority Bulk.

Requesting notification of message receipt

When you send someone a private message, you can tell FCIS to notify you of the message status. Notifications are placed in your Mailbox. The message is marked as Registered.

To be notified when the recipient reads your message, choose Message > Receipt > Receipt on Read (FirstClass) or select Receipt on read (web).

To be notified when your message is delivered to the recipient's Mailbox, choose Message > Receipt > Receipt on Delivery. This option is useful when the recipient is on another FCIS server; it will not work on most other mail systems.

To be notified each time your message is delivered to another server on its route, choose Message > Receipt > Receipt on Route. This option is useful for detecting problems in multiserver FCIS mail systems; it will not work on most other mail systems.

Preventing generation of nondelivery notices

By default, your FCIS post office generates a nondelivery notice (NDN) when your message cannot be delivered. This notice is placed in your Mailbox.

If you do not want to receive a nondelivery notice for a particular message, choose Message > Receipt > Suppress NDN.

Setting message sensitivity

Currently, message sensitivity has no effect on how FCIS handles messages. It is provided as information for the recipient, and could be used by third-party gateways

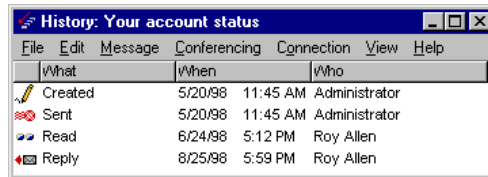
By default, messages are assigned Normal sensitivity. To change sensitivity, choose Message > Sensitivity > Sensitivity Personal, Sensitivity Private, or Sensitivity Company.

Checking whether a message has been read

FCIS tracks the history of each message. This history includes when it was created, who has read it and when, and whether it was worked with in any other way (for example, forwarded).

To see the history of a message in FirstClass, select or open the message, then choose Message > History.

History (FirstClass)



What	When	Who
Created	5/20/98 11:45 AM	Administrator
Sent	5/20/98 11:45 AM	Administrator
Read	6/24/98 5:12 PM	Roy Allen
Reply	8/25/98 5:59 PM	Roy Allen

In the history window, you can double-click a user's name to see the résumé for that user. Résumés are described in "Creating your résumé" on page 201. If you double-click a gateway ("Routed to"), you will see information about that gateway.

To see the history of a message using a web browser, open the message, then click History.

History (web)

History		
What	When	Who
Created	Fri, 23 Jul 1999 13:43:04 -0400	Administrator
Sent	Fri, 23 Jul 1999 13:43:04 -0400	Administrator
Read	Fri, 23 Jul 1999 13:43:31 -0400	Roy Allen
Reply	Fri, 23 Jul 1999 13:43:33 -0400	Roy Allen

The names of Bcc recipients do not appear in the history, except to themselves and to the message sender.

Making FirstClass your Internet mail client

By default, FirstClass is not used to send and receive Internet mail; it is kept separate from your Internet connection. If you make FirstClass your Internet mail client, FirstClass:

- sends and receives Internet mail

- can use mailto: links (links in FirstClass messages or documents, or on web pages, that open preaddressed messages).

To use FirstClass to send and receive Internet mail:

1. Choose Edit > Preferences.
2. Select Register FirstClass® as default Internet mail client on the General tab.
3. Click OK.

If you change your mind

If you made FirstClass your Internet mail client, but now want to use your browser instead, start up your browser, then make it your mail default.

Forwarding messages

You may be able to forward a message you have received to another user or a conference. To do this:

1. Select (FirstClass only) or open the message.
2. Choose Message > Forward (FirstClass) or click Forward (web).

This creates a copy of the message, including any attachments. The Subject field contains Fwd: and the subject of the original message. Your name, and the name of the original sender, are in the From field.

3. Address the message.
4. *optional*
Make any changes you want to the message body.
5. Send the message.

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Forwarding messages automatically

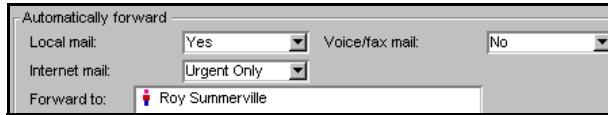
You may be able to forward your messages to another user or a conference automatically. This is useful when you go on vacation and you want your mail answered by someone else.

To forward your messages automatically:

1. Choose Edit > Preferences (FirstClass) or click Preferences, then Preferences again (web).
2. Choose the types of mail you want forwarded on the Messaging - Mail Rules tab (FirstClass) or section (web).

For each type of mail, choose Yes to forward all mail or Urgent Only to forward just urgent mail.

Automatically forward preferences



Automatically forward

Local mail: Yes Voice/fax mail: No

Internet mail: Urgent Only

Forward to: Roy Summerville

Note If you receive messages from an automated listserver, be cautious about forwarding Internet mail. Every message you receive from the listserver will be forwarded.

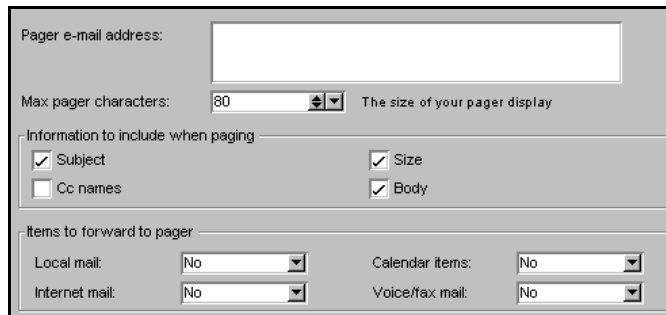
3. Enter the names of the people to whom you want your messages forwarded, in the same way you would address mail, at Forward to.
4. Click OK (FirstClass) or Save (web).

Forwarding messages to your paging system

FCIS may be able to notify you of new messages through your pager, if you have an e-mail-based paging system. To forward new messages to your paging system:

1. Choose Edit > Preferences (FirstClass) or click Preferences, then Preferences again (web).
2. Fill in the following fields on the Messaging - Paging tab (FirstClass) or section (web):

Paging preferences (FirstClass)



Pager e-mail address:

Max pager characters: 80 The size of your pager display

Information to include when paging

☒ Subject ☒ Size

☐ Cc names ☒ Body

Items to forward to pager

Local mail: No Calendar items: No

Internet mail: No Voice/fax mail: No

Pager e-mail address	the e-mail address of your paging system
Max pager characters	the size of your pager display FCIS will try to format the message to fit this size.
Information to include when paging	the message information you want forwarded to your paging system On the web, choose Yes to select a particular type of information.
Items to forward to pager	the types of mail you want forwarded to your paging system For each type of mail, choose Yes to forward all mail or Urgent Only to forward just urgent mail.

3. Click OK (FirstClass) or Save (web).

Forwarding messages to your paging system

Replying to messages

You can send a message reply to:

- the sender plus all other recipients of the message
- just the sender
- just the conference that contains the message.

No matter how you decide to direct your reply, you can update the recipients of your reply just as you would for any other message.

A message reply is given a subject of Re: plus the subject of the original message.

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Specifying your reply preference

FCIS lets you specify who you want to receive replies by default. To set this default:

1. Choose Edit > Preferences (FirstClass) or click Preferences, then Preferences again (web).
2. Choose one of the following at Reply preference on the Messaging - Mail Rules tab (FirstClass) or section (web):

Automatic	<i>for a private message</i> addresses the reply to the sender and all other recipients
	<i>for a message in a conference</i> addresses the reply to the conference only
Reply All	addresses the reply to the sender and all recipients, for both private messages and messages in conferences

Reply Sender addresses the reply to the sender only, for both private messages and messages in conferences

3. Click OK (FirstClass) or Save (web).

Replying to your default recipients

To reply to the recipients you specified in your preferences:

1. Select (FirstClass only) or open the message.
2. Choose Message > Reply (FirstClass) or click Reply (web).
3. Type and send your reply as you would any message.

Specifying reply recipients

If you do not want to send a reply to your default recipients, you can direct your reply to:

- the sender and all other recipients
- the sender only
- the original sender, in the case of a forwarded message
- the conference only.

Note If you are using a web browser, you can only do this by manually updating the message envelope.

Replying to everyone To reply to the sender and all other recipients, choose Message > Reply Special > Reply All. The sender's name is placed in the To field of the reply. The names of all other recipients are placed in the Cc field.

Replying to the sender only To reply to just the sender, choose Message > Reply Special > Reply Sender.

Replying to the original sender only To reply to just the original sender of a forwarded message, choose Message > Reply Special > Reply Original Author.

Replying to the conference only

To reply to just the conference that contains a message, choose Message > Reply Special > Reply Conference.

Quoting the original message

When you reply to a message using a web browser, the original message is quoted by default. The name of the original message's sender is included in the reply.

Quote in a reply (web)

```
Sandra Jones writes:
>Next week's meeting is scheduled.
OK, thanks for letting me know.
```

When you reply to a message using FirstClass, the original message is not quoted by default, but you can quote part or all of this message. The name of the original message's sender is included in a reply that includes a quote.

Quoted text is normally formatted in a special way, to differentiate it from your reply text. By default, FirstClass formats quoted text as black text on a gray background. You can change this formatting default as described in "Specifying your quoted text preference" on page 138.

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Quote in a reply (FirstClass)

```
Sandra Jones writes:
Next week's meeting is scheduled.
OK, thanks for letting me know.
```

Quoting part of a message

To partially quote a message:

1. Open the message to which you want to reply.
2. Select the text you want to quote.
3. Choose Message > Reply.
4. Prepare and send the reply as usual.

You can type your reply above, below, or interspersed within the quoted text.

Quoting the whole message

To quote all of a message:

1. Open the message to which you want to reply.
2. Choose Message > Reply Special > Reply with Quote.
3. Prepare and send the reply as usual.

You can type your reply above, below, or interspersed within the quoted text.

Note If you want to direct your reply using menu commands such as Reply Sender, rather than sending it to your default recipients or updating the reply envelope, you must select the text you want to quote. You cannot choose both Reply with Quote and a directed reply menu command.

Specifying your quoted text preference

Applies to FirstClass only.

FirstClass lets you specify how quoted text will be formatted in your replies. To set this preference:

1. Choose Edit > Preferences.
2. Specify the font attributes you want at Quoted text on the Content - Display tab.

Selecting the checkbox at Set font, Set size, or Set color tells FirstClass to use the value you select in the corresponding field.

Quoted text preferences

A screenshot of a dialog box titled "Quoted text". It contains several options for formatting quoted text. On the left, there are three checkboxes: "Set font:" (unchecked), "Set size:" (unchecked), and "Set color:" (unchecked). Each checkbox is followed by a corresponding field: a dropdown menu for font, a numeric spinner for size (set to 10), and a color picker for color. Below these is a checked checkbox for "Gray background". On the right side of the dialog, there are three more checkboxes: "Bold" (unchecked), "Italic" (unchecked), and "Underline" (unchecked).

3. Click OK.

Replying automatically

You may be able to make FCIS reply automatically to every message you receive. This is useful, for example, if you want to inform people that you are out of the office.

To turn on automatic reply:

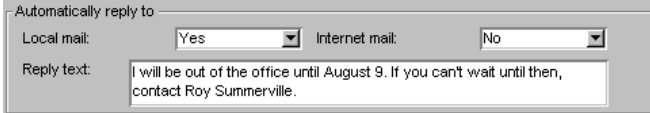
1. Choose Edit > Preferences (FirstClass) or click Preferences, then Preferences again (web).
2. Choose the types of mail for which you want to generate automatic replies on the Messaging - Mail Rules tab (FirstClass) or section (web).

For each type of mail, choose Yes to reply to all mail or Urgent Only to reply to just urgent mail.

Note If you receive messages from an automated listserver, be cautious about replying automatically to Internet mail. Your automatic reply will be returned for every message you receive from the listserver.

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Automatic reply preferences



Automatically reply to

Local mail: Yes Internet mail: No

Reply text: I will be out of the office until August 9. If you can't wait until then, contact Roy Summerville.

3. Type your automatic reply at Reply text.
4. Click OK (FirstClass) or Save (web).

Viewing related messages

Messages may be related according to any criteria; they may have the same author, the same subject, or were sent on the same day.

In addition, messages that are sent in response to other messages are related. As users reply to a message you sent, or to a message in a conference, they create a thread of related messages. Each reply in the thread is numbered; by default, the

subject of the first reply starts with "Re:", the subject of the reply to this reply starts with "Re(2):", and so on. When you group messages by subject in List view, all older messages in a thread are grouped under the most recent message.

Following message threads

If you open or select a message that is part of a thread in FirstClass, you can open the next message in the thread by choosing Conferencing > Navigation > Next in Thread.

To open the previous message in this thread, choose Conferencing > Navigation > Previous in Thread.

When there are no more messages in the thread, FirstClass alerts you.

If you are using a web browser, you can open a message that is part of a thread, then click Next in Thread or Previous in Thread. You are told when there are no more messages in the thread.

Selecting related messages

Applies to FirstClass only.

You can select messages based on a common attribute, such as the same author or same date. To do this, Control-Shift-click (Windows) or Command-Shift-click (Mac OS) a message with the attribute you want to select. Click in the column that represents this attribute. For example, to select all messages with a common subject, click one occurrence of this subject.

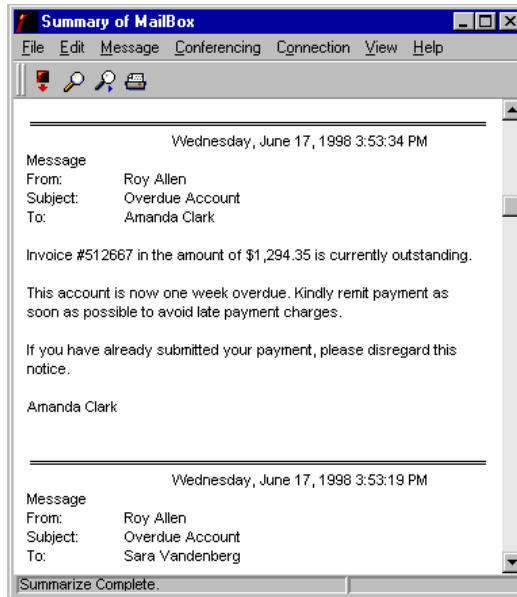
Working with selected messages

To open multiple selected messages, choose File > Open > Open Selected.

To print multiple selected messages, choose File > Print.

To view the combined contents of multiple selected messages in a single window, choose Conferencing > Summarize Selected Messages. The messages are displayed one after the other in a temporary document that is no longer accessible once you close it.

Summarized messages



To search this document for specific text, choose Edit > Find. To print this document, choose File > Print. To save this document as a plain text file, choose File > Save As, then save it as you normally would.

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Viewing related messages

Saving addresses for future use

FCIS lets you create an address book for storing:

- personal e-mail addresses
You can store addresses and other personal information for anyone you contact using FCIS. Your personal addresses can be people who are not currently registered with your FCIS server, or people who are registered, but whom you want to access in a different way, for example by nickname.
- mail lists that let you send a message to a predefined group of recipients.

Tip We recommend that you consider creating a personal conference rather than a mail list, if all the recipients would have access to your conference. For information on the benefits of conferences, and how to create a personal conference, see the “Using conferences” section of this book.

To open your address book, choose File > Open > Address Book (FirstClass) or click it (web). In FirstClass, an address book is placed on your Desktop, if it is not already there. It may also be placed on your Desktop when you add your first personal address or mail list.

Do not move your address book off your Desktop, or it will no longer work. If you inadvertently move your address book off your Desktop, you can move it back, and it will work again.

Adding names to your address book

When you add an e-mail address to your address book, that address is added to your view of the Directory on your FCIS server (other users will not see your personal addresses when they view the Directory).

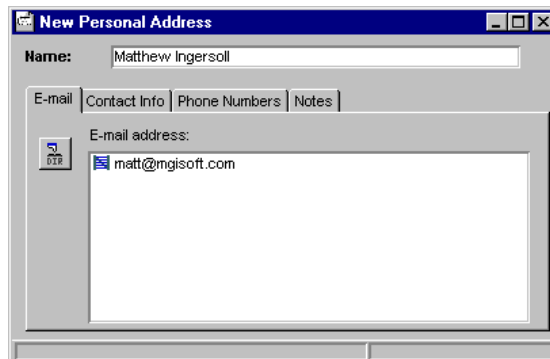
Adding entries (FirstClass)

To add an entry to your address book using FirstClass:

1. Choose File > New > New Personal Address.

Shortcut If the address you want to add is in an FCIS message or document, highlight it, then choose Conferencing > Add to Address Book. If you do this, the information in the next two steps is prefilled.

New Personal Address (FirstClass)

The image shows a screenshot of a software window titled "New Personal Address". The window has a blue title bar with standard window controls. Inside, there's a "Name:" label followed by a text box containing "Matthew Ingersoll". Below this is a tabbed interface with four tabs: "E-mail", "Contact Info", "Phone Numbers", and "Notes". The "E-mail" tab is currently selected. Under the "E-mail" tab, there's a label "E-mail address:" followed by a large text area containing "matt@mgiisort.com". To the left of the email text area is a small icon labeled "DIR". At the bottom of the window, there are two empty rectangular boxes.

2. Type the person's name as you want it to appear in the Directory at Name.
3. Supply the person's e-mail address at E-mail address.

If the name is not yet in the Directory, type the address and press Tab.

If the name is in the Directory, you can type a partial name, just as you would when addressing a message, or click DIR, to open the Directory. Select the person in the Directory list, then click Select.

4. *optional*
Add personal information as desired on the Contact Info, Phone Numbers, and Notes tabs.
5. Close the New Personal Address form and save your changes.

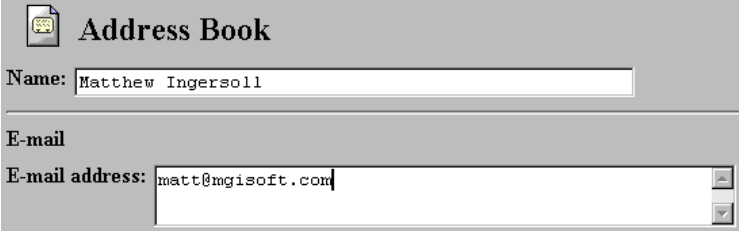
Adding entries (web)

To add an entry to your address book using a web browser:

1. Click New Personal Address.

Shortcut If the address you want to add is the sender of an FCIS message, open that message, then click New Personal Address. If you do this, the information in the next two steps is prefilled.

New Personal Address (web)



2. Type the person's name as you want it to appear in the Directory at Name.
3. Type the person's e-mail address at E-mail address.
4. *optional*
Add personal information as desired in the rest of the Address Book form.
5. Click Save.

Creating mail lists

Applies to FirstClass only.

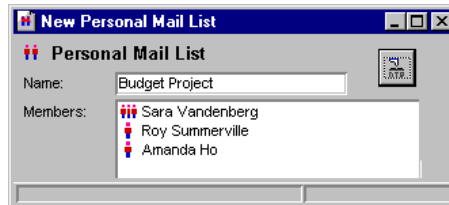
If you routinely send mail to the same group of users, you can create a mail list that contains these users. When you send a message, you just address it to the mail list, and all users in the

list receive the message. Your personal mail lists, just like your personal addresses, will be shown in your view of the FCIS Directory.

To add a mail list:

1. Choose File > New > New Personal Mail List.

New Personal Mail List



2. Type the name of the mail list as you want it to appear in the Directory at Name.
3. Add user names at Members in any of the ways you would use to address a message.

To open the Directory, click DIR. Select the names you want from the Directory list, then click Select.

4. Close the New Personal Mail List form and save your changes.

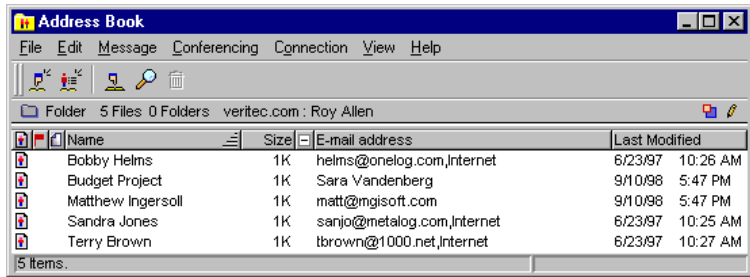
Updating address book entries

When you add a new personal address or mail list, the entry is displayed in your personal address book window.

Updating entries (FirstClass)

To update an address book entry using FirstClass, double-click it. Change the information in the form as required, then close and save your changes.

Address Book (FirstClass)



To delete an address book entry, select it, press Delete, then click Delete at the confirmation.

Updating entries (web)

To update an address book entry using a web browser:

Address Book (web)

Subject	Size	Name	Last Modified
sanjo@metalog.com,Internet	1	Sandra Jones	6/23/97
helms@onelog.com,Internet	1	Bobby Helms	6/23/97
tbrown@1000.net,Internet	1	Terry Brown	6/23/97
matt@mgiisoft.com	1	Matthew Ingersoll	9/10/98
Sara Vandenberg	1	Budget Project	9/10/98

1. Click the entry.
2. Click Edit Form.
3. Change the information as required.
4. Click Save.

Updating address book entries

Transferring files

Files attached to messages

There are several ways to transfer files, such as word processing or graphics files, to other users or conferences. This chapter discusses transferring files by attaching them to messages.

Note No matter how files are transferred, they are first copied to the server (uploaded). When users save (download) uploaded files to their computers, the files are copied from the server.

File transfers take place in the background; while they are going on, you can perform other FirstClass tasks, including initiating additional file transfers.

If you or your message recipients use modems, consider compressing a large file before attaching it. Compressed files often transfer faster and take up less space.

You may also be able to record a spoken message or other sound and attach it to your message as a file. For instructions on doing this, see “Attaching recordings to messages” on page 153.

Attaching files to messages

You can attach files both in FirstClass and using a web browser.

Attaching files (FirstClass)

To attach a file to a message using FirstClass:

1. Create a new message as usual.

Several of the standard message forms accommodate attached files. The File Transfer form is specifically designed for this purpose.

2. Choose File > Attach File.

If you are using the File Transfer form, click Attach File.

Shortcut You can drag a file to the message envelope to attach it. Using this method, you can select and drag multiple files simultaneously. If you drag files, skip the remaining steps; file transfer begins immediately.

3. Choose the file you want to attach.

4. Click Open.

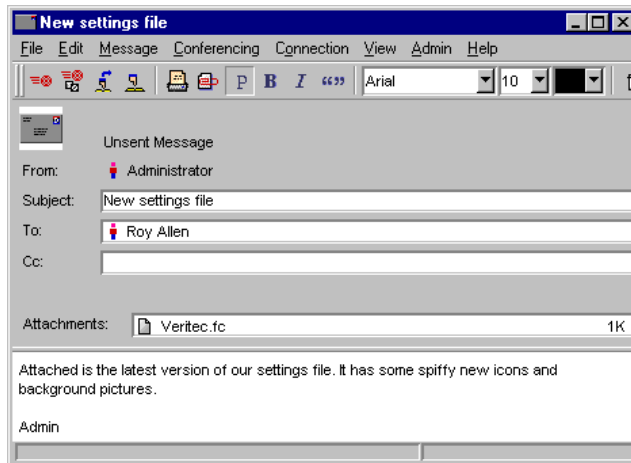
To remove an attachment, select it, then press Delete.

When file transfer begins

While FirstClass is transferring a file, a progress bar is displayed. Do not send or close the message until the progress bar disappears.

After a file is transferred, it is displayed in the Attachments field of your message. If this field is not visible, drag the split bar down.

Message with attachment



After you have attached all the files you want, send the message as usual. Before you send the message, you can delete an attachment just as you would a recipient.

Attaching files (web)

To attach a file to a message using a web browser:

1. Create a new message as usual.
2. Click Browse.
3. Choose the file you want to attach.
4. Click Open.

To attach multiple files, you must use a message form that supports multiple attachments. The standard message form that ships with FCIS only allows you to attach one file.

To remove an attachment, select it, then press Delete.

Previewing attached files

Applies to FirstClass only.

FirstClass lets you preview an attached file before you download it. To do this, select the attachment, then choose File > View File.

Shortcut Double-click the attachment.

If the file downloads rather than previewing, your FirstClass client does not include a viewer that can display this type of file.

Attaching recordings to messages

Applies to FirstClass only.

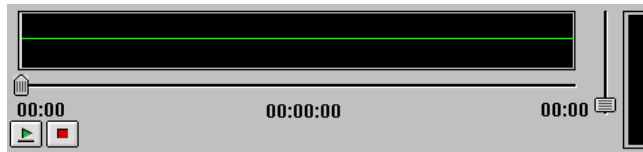
If your computer is connected to a microphone, you may be able to use FirstClass to record a spoken message or any other sound and attach this recording to a message as a .wav file. You can only attach a single recording.

To attach a recording:

1. Create the message in the usual way.
2. Choose Edit > Insert > Insert Voice.

A recorder panel is added to your message.

Recorder panel



3. Click Record on this panel.
4. Use your microphone to record your message or sound.
5. Click Stop when you are finished recording.

To review the recording, click Play. You can adjust the volume using the slider on the right of the recorder panel.

To change the recording, delete the .wav attachment and repeat this procedure.

Downloading attached files

You can download attached files both in FirstClass and using a web browser.

Note If a conference message with an attachment appears in italics, it has not yet been approved. Your administrator may have set up FCIS to require approval of messages with attachments to avoid the spread of viruses. You cannot download files from an unapproved message.

Downloading attached files (FirstClass)

To download an attachment using FirstClass:

1. Select the attachment in the message envelope.
2. Choose File > Save Attachment.

Shortcut Drag the attachment to the desired location on your computer. If you drag the attachment, skip the remaining steps; file transfer begins immediately.

3. Select the folder where you want the attached file to be saved.

4. Click Save.

Downloading attached files (web)

To download an attachment using a web browser, click the attachment in the message envelope.

Specifying the default folder for downloaded files

Applies to FirstClass only.

When you download a file, FirstClass suggests a default folder as the destination. To change the default destination folder for downloaded files:

1. Choose Edit > Preferences.
2. Select the folder you want as the default at Download folder on the General tab.

Click Browse to see additional folders.

3. Click OK.

Specifying the default folder for downloaded files

Files stored directly on a server

As well as making files available to other users by attaching them to messages, as discussed in Chapter 19, “Files attached to messages”, you can send (upload) them directly to an FCIS server.

The advantage to uploading files directly to servers is that they are available to anyone with access to the conferences or folders to which you upload the files. The disadvantage is that you do not have a message body in which to add descriptive information, and you cannot later forward the file to someone else as easily as you could if it were attached to a message.

If you want to upload large files, consider compressing them first. Compressed files take up less space on the server.

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Uploading files

Applies to FirstClass only.

To upload a file to a conference or folder:

1. Open the conference or folder.
2. Choose File > Upload.
3. Select the file you want to upload.
4. Click Open.

To upload a plain text file and convert it automatically to a FirstClass document, drag it to the appropriate conference or folder.

When file transfer begins

While FirstClass is transferring a file, a progress bar is displayed.

After a file is transferred, it is displayed in the list for the conference or folder. If it was not converted to a FirstClass document, it has the subject Uploaded File.

Uploaded file

	Name	Size	Subject	Last Modified
	Template	2K	Uploaded File	1/20/99

Changing the subject

You can change the subject to make it more descriptive. To do this:

1. Select the uploaded file.
2. Choose File > Properties (Windows) or Get Info (Mac OS).
3. Type the subject you want at Subject.
4. Close the Info window and save your change.

Downloading uploaded files

You can copy (download) an uploaded file to your computer.

Note If an uploaded file appears in italics, it has not yet been approved. Your administrator may have set up FCIS to require approval of uploaded files to avoid the spread of viruses. You cannot download unapproved uploaded files.

Downloading uploaded files (FirstClass)

To download an uploaded file using FirstClass:

1. Select the file.
2. Choose File > Download.
3. Select the folder where you want the uploaded file to be saved.

FirstClass displays a default folder. You can change this default as described in “Specifying the default folder for downloaded files” on page 155.

4. *optional*
Rename the file.
5. Click Save.

Note If you are downloading a FirstClass document, it is automatically converted to a plain text file.

**Downloading uploaded
files (web)**

To download an uploaded file using a web browser, click the file.

Downloading uploaded files

Interrupted file transfers

Applies to FirstClass only.

FirstClass lets you interrupt file transfers before they are complete, and resume these transfers from the point they were interrupted. You can also resume file transfers that were interrupted due to problems such as power failures.

Interrupting file transfers

You can interrupt a file transfer as long as the progress bar is still displayed. To interrupt the file transfer, click Cancel in the progress bar display.

If you try to disconnect from the server or quit FirstClass before a file has been transferred, you are notified of the file transfer. To stay connected and continue the file transfer, click Cancel. To disconnect immediately and interrupt the file transfer, click Disconnect Now. If you do nothing, the file transfer is completed before you are disconnected or FirstClass quits.

A file that has not been completely transferred has this icon:

Incomplete file transfer icon



Resuming file transfers to servers

Whether you are uploading a file directly to a server or attaching a file to a message, FirstClass considers you to be transferring a file to the server. In both cases, you can resume the file transfer. If the file was being attached to a message, you can resume the file transfer as long as the message is unsent.

To resume a file transfer, select the partially transferred file, then repeat the file transfer procedure you followed originally. The balance of the file is transferred.

Resuming file transfers to your computer

To resume a file download to your computer, repeat the download procedure you followed originally, selecting the same destination as you did before, and replacing the existing file when prompted. The balance of the file is downloaded.

Using calendars

About calendars

An FCIS calendar is like your personal diary; it records time commitments, such as meetings or lunches (*calendar events*), and tasks that you need to complete, such as submitting a report (*calendar tasks*).

Unlike your personal diary, an FCIS calendar can be viewed and updated by other users. This allows everyone to schedule meetings at mutually convenient times. To view another user’s calendar, select the user from the Directory listing, then choose Open User Calendar from the shortcut menu (FirstClass) or list the user in the Directory, then click the View Calendar button beside the user (web).

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FCIS supports the following types of calendars:

- personal calendar** your own calendar
You can limit what others can see on your personal calendar.
- group calendar** a public calendar that enables a specific group of people to coordinate their time and tasks
- resource calendar** a public calendar that represents a specific resource, such as a projector
A resource calendar is normally updated when users book the resource as part of creating a calendar event. If you update a resource calendar directly, a new event is created on the same date in your personal calendar.
- location calendar** a public calendar that represents a specific resource, such as a meeting room
Location calendars are updated just like resource calendars.

FCIS calendars work much like conferences. Your administrator can create group, resource, and location calendars.

Note If you are using a web browser, you need to have JavaScript enabled to use all the calendar features.

Viewing calendars

To open your personal calendar using FirstClass, choose File > Open > Calendar. A personal calendar is placed on your Desktop, if it is not already there.

To open your personal calendar using a web browser, click Calendar.

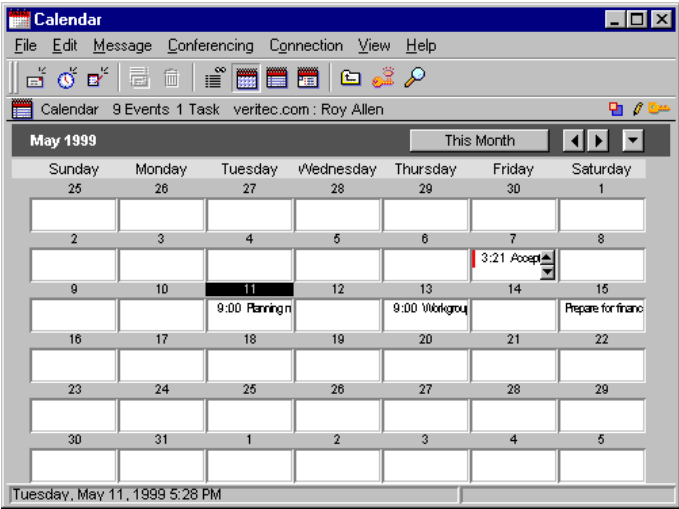
You can look at a calendar using the same views as you use for conferences. While in these views, you can do the same things you do with messages. For example, in List view you can sort calendar events.

In addition, there are the following specialized calendar views:

- monthly (shows the least detail)
- weekly
- daily (shows the most detail).

If you choose View > View by Month (FirstClass) or click View by Month (web), your calendar will look something like this:

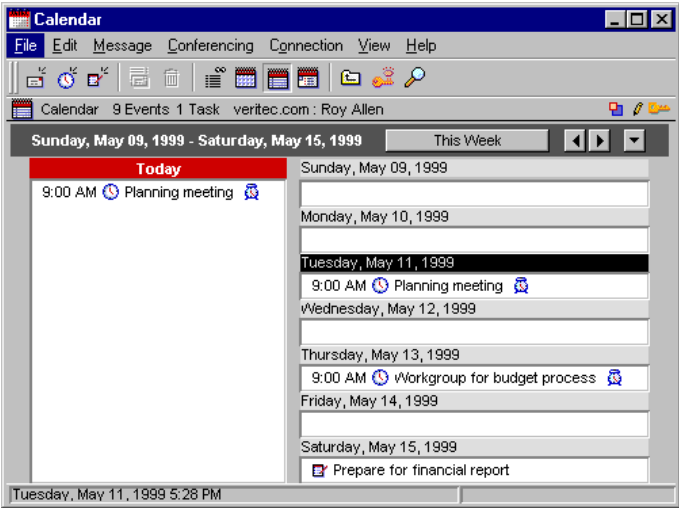
Calendar monthly view (FirstClass)



In FirstClass, the current day is highlighted.

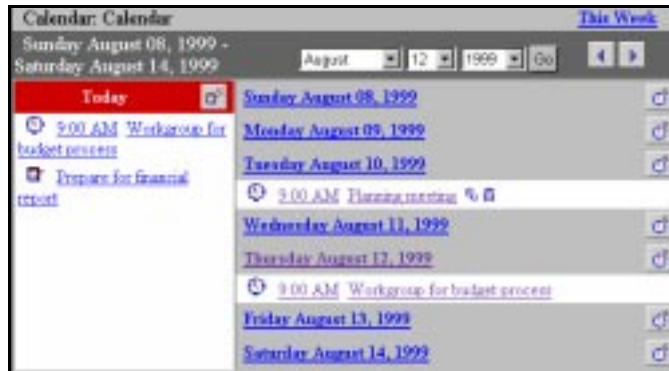
If you choose View > View by Week (FirstClass) or click View by Week (web), your calendar will look something like this:

Calendar weekly view (FirstClass)



Viewing calendars

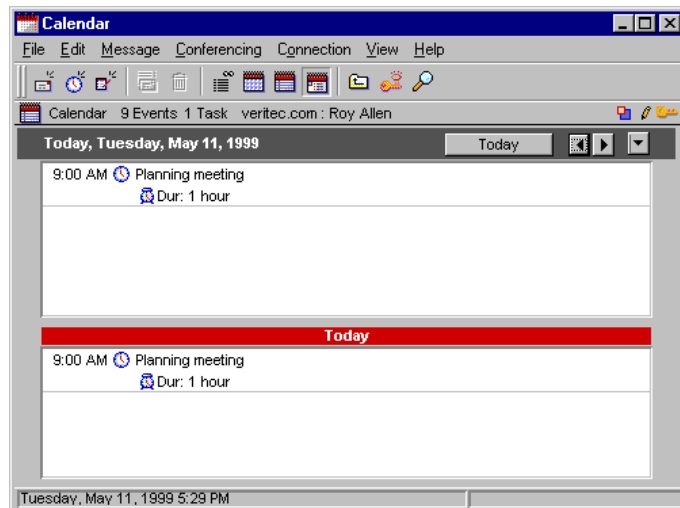
Calendar weekly view (web)



In FirstClass, the current day is highlighted.

If you choose View > View by Day (FirstClass) or click View by Day (web), your calendar will look something like this:

Calendar daily view (FirstClass)



Navigation

The navigation buttons in the calendar views let you scroll backward and forward through calendar pages. You can also return to the current month, week, or day, or go to the page containing a specific date.

If you are using a web browser, you can click a date on the weekly or monthly calendar to go to the daily view for that date.

*Going to a specific date
(FirstClass)*

To go to the page containing a specific date, click:

Calendar date selector button



Click the date you want on the popup calendar, then click OK.

*Going to a specific date
(web)*

To go to the page containing a specific date, choose the appropriate values from the date dropdown fields, then click Go.

*Going to the first unread
item*

Applies to FirstClass only.

You can open the first unread calendar item by choosing Conferencing > Navigation > Next Unread.

**Customizing your
calendar views**

applies to FirstClass only

You can customize your monthly and weekly calendar views in the following ways:

- display week numbers
- change the day on which the week starts.

To customize your calendar views:

1. Choose Edit > Preferences.
2. Make the changes you want to the following fields on the Calendar tab:

Show week numbers	displays week numbers To use this, you must choose Monday as your week start day.
Week start day	the day on which you want the week to start
3. Click OK.

Calendar reminders

When you create a calendar event or task, you can tell FCIS to generate a reminder. A reminder appears as a dialog box if you are using FirstClass and are logged into an FCIS server. This

dialog box contains a Details button that opens the event or task details when clicked.

If you are not logged in or are using a web browser, the reminder is sent to your Mailbox as a message.

Forwarding reminders to paging systems

You can forward reminders to your paging system just as you do messages. For instructions, see “Forwarding messages to your paging system” on page 132. Be sure to choose a value other than No at Calendar items.

The Today list

Daily and weekly calendar views include a Today list. This list highlights all the calendar events and tasks that are of concern to you today (events that take place today, and tasks that start today or are still ongoing).

Today’s tasks move from the calendar to the Today list. Today’s events are shown in both places.

Note Completed tasks are shown only on the calendar, on the dates they were completed. Tasks that have not yet started are also shown only on the calendar, on their start dates. Tasks with no start date are shown only on the Today list.

Working with calendar events

Calendar events are time commitments such as meetings, lunches, appointments, and so on. You can add events to your own calendars, and may be able to view or add events on others' calendars.

Adding calendar events

Tip If you are using a web browser and will be booking a resource or location for the event, you can check its availability first by looking at its calendar. To do this, list the resource or location in the Directory, then click the View Calendar button beside the entry.

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To add an event to a calendar:

1. Open the calendar.
2. Choose Message > New Calendar Event (FirstClass) or click New Calendar Event (web).

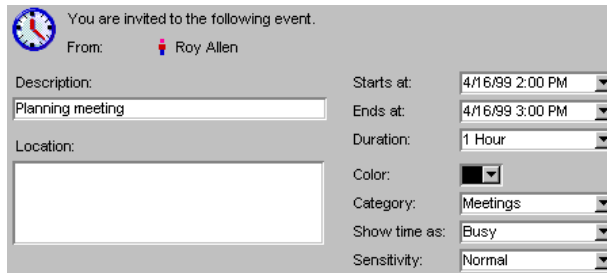
Shortcut To create an event that starts on a particular day when using FirstClass, double-click either within the blank space under the day you want or on the date itself.

When using a web browser, click the New Event icon to the right of the date.

3. Fill in the following basic information on the calendar event form:

Adding calendar events

Calendar event form - Event tab (FirstClass)



This screenshot shows a web form titled "You are invited to the following event." with a clock icon. The form is for an event from "Roy Allen". It includes fields for Description ("Planning meeting"), Location (empty), Starts at ("4/16/99 2:00 PM"), Ends at ("4/16/99 3:00 PM"), Duration ("1 Hour"), Color (black), Category ("Meetings"), Show time as ("Busy"), and Sensitivity ("Normal").

Calendar event form - Basic information (web)



This screenshot shows a web form titled "Calendar Event" with a clock icon. It is for an event from "Roy Allen". The form includes fields for Description ("Planning meeting"), Location (empty), Starts at (date and time: Jul 23 1999 10:00 AM), Duration ("2 Hours"), Priority ("Normal"), Color (a color palette), Category ("Meetings"), Show time as ("Busy"), and Sensitivity ("Normal").

Note Where there are dropdown fields on the web version of the form, click them to choose appropriate values.

Description the event description as you want to see it on the calendar and in any reminders

Location the location for the event

Only type a location here if it is not in the Directory. For locations in the Directory, use the Resources to book field. If you leave this field blank, then book a location at Resources to book, the location is filled in here.

Starts at	<p>the start date and time for the event</p> <p>FirstClass: Click this field to open a popup calendar, click the start date, choose or type a start time, then click OK. This prefills Ends at based on the Duration value. You can change either Duration or Ends at, and the change will be reflected in the other field.</p> <p>Using FirstClass, you can also hover your cursor over the displayed date and time to change values. When the cursor changes to a calendar, drag it up or down to change the date one day at a time. When the cursor changes to a clock, drag it up or down to change the time by 15-minute increments.</p>
Ends at	<p><i>applies to FirstClass only</i></p> <p>the end date and time for the event</p> <p>Click this field to open a popup calendar, then set the date and time as for Starts at.</p>
Duration	<p>the length of time the event is scheduled to last</p> <p>Choose a value or type your own. If you do not specify a unit, such as minutes or days, FCIS assumes hours.</p>
Priority	<p>by default, the priority is Normal</p> <p>If you change the priority to Urgent, the event appears in bold on the calendar.</p> <p>FirstClass: To change the priority to Urgent, choose Message > Priority > Priority Urgent.</p>
Color	<p>the background color for this event on the calendar</p> <p>You may want to color code certain events. For example, you could give all meetings a blue background. Users who cannot edit the calendar will only see a gray background.</p>
Category	<p>the type of event</p> <p>Choose a category or type your own, if desired.</p>

Show time as your level of availability for other commitments during this event

If you choose Busy, then schedule another event at the same time, a red bar to the left of the affected events indicates that you have a time conflict.

Sensitivity the event sensitivity

Events with Normal sensitivity are seen by others viewing the calendar. Depending on calendar permissions, events with any other sensitivity may show only the time when viewed by others. With this exception, sensitivity works just as it does for messages.

4. *to make the event show up repeatedly on the calendar*
Click the Repeat tab (FirstClass) or go to the Repeat section (web) and fill in the following fields:

Calendar event form - Repeat tab (FirstClass)

Use this tab for events that will repeat on a regular basis.

Repeat interval: When to repeat this event on the calendar

Repeat until: The last time to put this event on the calendar

Calendar event form - Repeat section (web)

Repeat

Repeat interval:

Repeat until:

Repeat interval when this event will be repeated

Repeated events are shown on all appropriate days on the calendar.

Repeat until the last date to repeat this event

FirstClass: Click this field to open a popup calendar, click the final date, then click OK.

If you make the event repeat, this icon is displayed beside the event:

Repeat icon



5. *to invite participants*

Click the Participants tab (FirstClass) or go to the Participants section (web) and fill in the following fields:

Calendar event form - Participants
tab (FirstClass)

Calendar event form - Participants
section (web)

Participants to invite

any users that you want notified of this event
Add users or mail lists just as you would when addressing a message. If a participant has a personal calendar, this event is added to that calendar. If a participant does not have a personal calendar, this form is sent to the participant's Mailbox as a message.

Ask participants to respond

displays Accept and Decline buttons on this form when the participants view it

Resources to book

any resources or locations that you want to book for this event

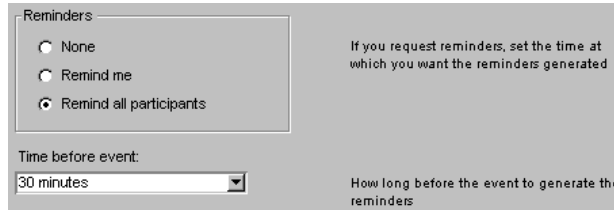
Resources and locations must be in the Directory. Add them just as you would when addressing a message to someone in the Directory. When you book a resource or location, that item's calendar is automatically updated.

FirstClass: You can view a resource or location calendar, to check whether the resource or location is free, by double-clicking the resource or location after you enter it.

6. *to generate reminders*

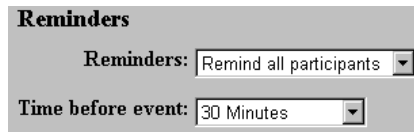
Click the Reminders tab (FirstClass) or go to the Reminders section (web) and fill in the following fields:

Calendar event form - Reminders tab (FirstClass)



The screenshot shows the 'Reminders' tab in the FirstClass calendar event form. It features three radio buttons: 'None', 'Remind me', and 'Remind all participants', with 'Remind all participants' selected. Below these is a dropdown menu for 'Time before event:' set to '30 minutes'. To the right, a text box explains: 'If you request reminders, set the time at which you want the reminders generated'. At the bottom right, another text box says: 'How long before the event to generate the reminders'.

Calendar event form - Reminders section (web)



The screenshot shows the 'Reminders' section in the web calendar event form. It has a title 'Reminders' and a dropdown menu labeled 'Reminders:' with 'Remind all participants' selected. Below this is a dropdown menu labeled 'Time before event:' set to '30 Minutes'.

Reminders who to remind:

Remind me only generates a reminder for yourself

Remind all participants generates reminders for all participants

Time before event how long before the event to generate reminders

Choose a value or type your own. If you do not specify a unit, such as minutes or days, FCIS assumes hours.

If you add reminders to the event, this icon is displayed beside the event:

Reminder icon



7. *optional*

Attach files or add a message body just as you would for a message.

8. Close the calendar event form (FirstClass) or click Save (web) to add this event to the calendar.

Changing your mind

If you are creating a calendar event and decide you do not want it, you can cancel it just as you would a message.

If you delete an event that you created previously, the event is removed from all participants' calendars.

Adding events from other calendars

applies to FirstClass only

You may be able to copy events from one calendar to another. This can be useful for adding events from group calendars to your personal calendar. To copy an event to another calendar, drag it from the source calendar to the appropriate date on the target calendar.

Viewing calendar events

As is the case for messages, a calendar event is flagged as unread until you open it or turn the unread flag off. Opening the event lets you view all its details.

You can view event history, just as you would the history of a message, to check whether participants have accepted or declined invitations.

Using FirstClass, you can also see some details for an event in a popup window by hovering your cursor over the event.

applies to FirstClass only

If the event includes a mail list as a participant, you can see who belongs to the mail list by selecting it from the Participants tab, then choosing Open User Info Form from the shortcut menu.

23**Updating calendar events**

To change details about an event, open it, make your changes, then close the form (FirstClass) or click Save (web).

If you change the start date, the event will move to the new date on the calendar.

Shortcuts *apply to FirstClass only*

To move an event, you can drag it to the new date.

Dragging an event to the Today list is the same as dragging it to today's date on the calendar.

To change the time of an event, you can hover the cursor over it and drag, just as you can in an opened event form.

If you delete a participant, the event is removed from that participants' calendar.

Responding to calendar events

If someone invites you to an event, the event is added to your calendar. If you see Accept and Decline buttons on the event form, click the appropriate button:

This button	Does this
Accept	accepts the invitation*
Accept with Reply	accepts the invitation and also creates a reply to the event sender This allows you to add further comments or questions.
Decline	declines the invitation*
Decline with Reply	declines the invitation and also creates a reply to the event sender

* If the person who invited you is not on your local server (and therefore cannot view the event history to check whether you accepted or declined), a message is generated for that person.

Sending event invitations over the Internet

If you invite someone with an Internet address (for example, andrea_farnham@avalon.com) to participate in your event, the recipient will receive a message with a vCalendar attachment. This attachment can be imported into the recipient's own calendaring application.

Working with calendar tasks

Calendar tasks are things that you need to complete, such as submitting a report or preparing an agenda for a meeting. You can add tasks to your own calendars, and may be able to view or add tasks on others' calendars.

Adding calendar tasks

To add a task to a calendar:

1. Open the calendar.
2. Choose Message > New Calendar Task (FirstClass), or click New Calendar Task or the New Task icon in the Today list (web).

Shortcut In FirstClass, double-click within the blank space in the Today list.

3. Fill in the following basic information on the calendar task form:

Calendar task form - Task tab
(FirstClass)

The screenshot shows a 'Calendar task form - Task tab' from the FirstClass application. The form is divided into two main columns. The left column contains: 'From:' with a contact icon and 'Roy Allen'; 'Description:' with a text box containing 'Agenda for planning meeting'; 'Task state:' with a dropdown menu showing 'Not Completed'; and 'Completed on:' with a dropdown menu showing 'Not Yet Complete'. The right column contains: 'Priority:' with a dropdown menu showing 'Normal'; 'Starts at:' with a dropdown menu showing 'None'; 'Due at:' with a dropdown menu showing '4/16/99'; 'Color:' with a color selection dropdown; 'Category:' with a dropdown menu; and 'Sensitivity:' with a dropdown menu showing 'Normal'. A small icon with a red checkmark is visible in the top left corner of the form.

Adding calendar tasks

Calendar task form - Basic
information (web)

Calendar Task

From: Roy Allen

Description: Agenda for planning meeting

Task state: Not Completed

Completed on: Jan 1 ---

Starts at: Jan 1 ---

Due at: Jul 30 1999 9:00 AM

Priority: Normal

Color: [Color palette]

Category: Other

Sensitivity: Normal

Note Where there are dropdown fields on the web version of the form, click them to choose appropriate values.

Description the task description as you want to see it on the calendar and in any reminders

Task state the status of the task
By default, the status of a new task is Not Completed.

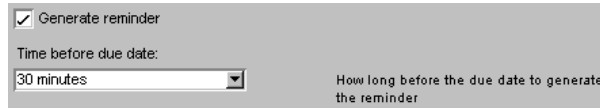
Completed on leave this field blank until the task is completed

Priority by default, the priority is Normal
If you change the priority to Urgent, the task appears in bold on the calendar and is shown at the top of the tasks in the Today list.

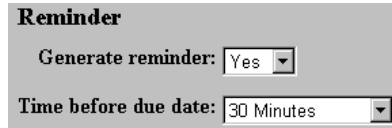
Starts at	<p>the start date for the task, if applicable</p> <p>FirstClass: If there is no specific start date, accept None. If there is a specific start date, click this field to open a popup calendar, click the start date, then click OK.</p> <p>Using FirstClass, if you specify a date in this field, you can hover your cursor over the date to change it one day at a time. When the cursor changes to a calendar, drag it up or down to change the date.</p>
Due at	<p>the due date and time for the task, if applicable</p> <p>FirstClass: If there is no specific due date, accept None. If there is a specific due date, enter it in the same way as the start date. Choose or type a time in the popup calendar, if necessary.</p> <p>Using FirstClass, if you specify a date and time in this field, you can hover your cursor over these values to change them. Change the date in the same way as the start date. To change the time in 15-minute increments, wait until the cursor changes to a clock, then drag it up or down.</p>
Color	<p>the background color for this task on the calendar</p> <p>You may want to color code certain tasks. For example, you could give all personal tasks a pink background. Users who cannot edit the calendar will only see a gray background.</p>
Category	<p>the type of task</p> <p>Choose a category or type your own, if desired.</p>
Sensitivity	<p>the task sensitivity</p> <p>Tasks with Normal sensitivity are seen by others viewing the calendar. Depending on calendar permissions, tasks with any other sensitivity may show only the time when viewed by others. With this exception, sensitivity works just as it does for messages.</p>

4. *to generate a reminder for a task with a due date*
Click the Reminder tab (FirstClass) or go to the Reminder section (web) and fill in the following fields:

Calendar task form - Reminder tab (FirstClass)



Calendar task form - Reminder section (web)



- Generate reminder** generates a reminder of the task
Web: Choose Yes to generate this reminder.
- Time before due date** how long before the due date to generate the reminder
Choose a value or type your own. If you do not specify a unit, such as minutes or days, FCIS assumes hours.

If you add a reminder to the task, this icon is displayed beside the task:

Reminder icon



5. *optional*
Attach files or add a message body just as you would for a message.
6. Close the calendar task form (FirstClass) or click Save (web) to add this task to the calendar.

Changing your mind If you are creating a calendar task and decide you do not want it, you can cancel it just as you would a message.

Adding tasks from other calendars *applies to FirstClass only*
You may be able to copy tasks from one calendar to another. This can be useful for adding tasks from group calendars to your personal calendar. To copy a task to another calendar, drag it

from the source calendar to the appropriate date on the target calendar.

Viewing calendar tasks

Using FirstClass, you can also see some details for a task in a popup window by hovering your cursor over the task.

Overdue tasks are shown in red. Completed tasks have a red line drawn through them.

Updating calendar tasks

To change details about a task, open it, make your changes, then close the form (FirstClass) or click Save (web).

If you change the start date, the task will move to the appropriate date on the calendar.

Shortcut *applies to FirstClass only*

To move a task, you can drag it to the new start date. Dragging a task to the Today list is the same as dragging it to today's date on the calendar.

Changing the task status To change the status of a task, choose the appropriate status at Task state on the calendar task form.

If you choose Completed, today's date appears at Completed on. You can change this date if necessary. In FirstClass, click Completed on to open a popup calendar. If you drag a completed task to another date using FirstClass, the Completed on date changes accordingly.

Shortcut If you are using FirstClass and you do not already have the task open, you can change the task status to Completed by clicking the task icon. Clicking this

icon again changes the status back to Not Completed.

Creating public calendars

Applies to FirstClass only.

You may be able to create group, resource, and location calendars just as your administrator does.

To create a public calendar:

1. Open the location (for example, a conference) where you want the calendar.
2. Choose File > New, then the appropriate type of calendar.

The new calendar opens.

3. *optional*
Rename the calendar.

Choose File > Properties (Windows) or Get Info (Mac OS). Type the calendar name at Name and a short description, if desired, at Subject. Close the Info window and save your changes.

Shortcut To rename the calendar, click the icon name twice to make it editable, type the new name, then press Tab.

4. Set calendar permissions to give others appropriate access to the calendar.

Note You can also change permissions for your personal calendar if you want to give other users more or less permission to use your calendar than is allowed by the default permissions.

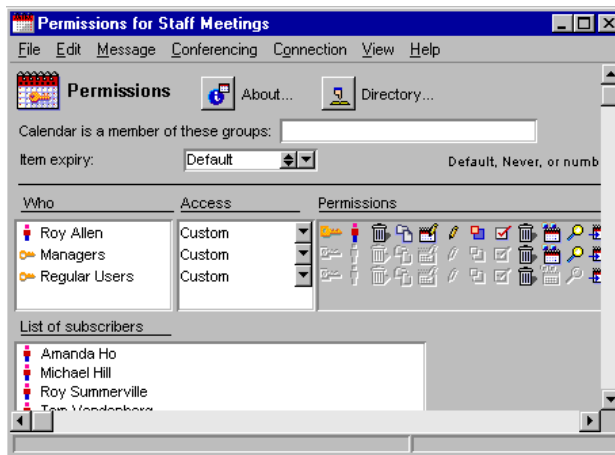
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Setting calendar permissions

After you have created a public calendar, you need to give others permission to use this calendar. To do this:

1. Choose Conferencing > Permissions with the calendar open or selected.

Permissions form (calendar)



2. Fill in the following fields:

Calendar is a member of these groups

Ignore this field; it is used by your administrator when creating public calendars.

Item expiry

The number of days an event or task can stay on your calendar before expiring.

Who

Fill in this field just as you would if you were creating a personal conference. For information, see “Setting conference permissions” on page 74.

Access

Choose the access level for each user and group you entered at Who:

No Access denies access to the calendar

See Times can look at the calendar, but only see the times set aside for events and tasks

Schedule Only	can add events to the calendar indirectly An event is added to a resource or location calendar indirectly when a user creates an event in another calendar and books this location or resource.
Schedule + Times	can look at the calendar (times only) and add events indirectly
Schedule + Details	can see details on the calendar and add events indirectly
Editor	has all previous permissions, and can open calendar items, edit and delete items, download attachments, and view item history
Custom	lets you customize the access level by setting individual permissions, as described in “Setting individual permissions”
List of subscribers	The names of the users to whom you want to give access to the calendar. Enter these names just as you did when adding names at Who. When you subscribe users to the calendar, it appears on their Desktops.

3. Close the Permissions form.

Your changes are saved automatically.

Setting individual permissions

You can set individual permissions just as you can for personal conferences. For information, see “Setting individual permissions” on page 79.

In addition to permissions described under personal conferences, there are permissions specific to calendars:

This permission	Lets users do this
View unrestricted details	see the details of items with a sensitivity of Normal

This permission	Lets users do this
Add participants	<i>applies to resource and location calendars</i> update the calendar by booking the resource or location when creating an event in another calendar
Open calendar	open the calendar This lets users see the times for events and tasks, but no other details.

For an example of how permissions work, see “An example of conference permissions” on page 81.

Providing information about the calendar

You can provide other users with information about the calendar by creating a résumé. To do this, open the Permissions form, then click About. For instructions on filling in the résumé, see “Creating your résumé” on page 201.

Updating the calendar’s Directory entry

You can view the Directory entry for the calendar, make it unlisted, and give it an alias, just as you can for a personal conference. For more information, see “Updating the conference’s Directory entry” on page 83.

Other ways to communicate with users

Chatting with other users

A chat is an online conversation among users who are currently connected to an FCIS server. The chat window contains a chat transcript that records everyone's contributions to the chat. You may be invited to join public chats set up by your administrator or private chats started by coworkers. You can also start your own private chats.

Setting chat preferences

You can prevent other users from issuing chat invitations to you, and turn off chat sounds. To do this:

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FirstClass

1. Choose Edit > Preferences.
2. Select chat preferences as desired on the Messaging - Chat tab:

Do not accept invitations prevents other users from inviting you to chat

Your name is italicized in the Directory.

Sounds during chat and invite activates sounds during chats
You can override this preference for individual chats using Enable sounds in the chat window.

3. Click OK.

Web

1. Click Preferences, then Preferences again.

2. Select chat preferences as desired in the Messaging - Chat section:

Accept invitations

allows other users to invite you to chat
Choose Yes to accept invitations. If you choose No, your name is italicized in the Directory.

Sounds during chat and invite

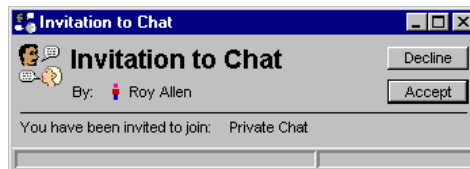
activates sounds during chats
Choose Yes to activate chat sounds. You can override this preference for individual chats using Enable sounds in the chat window.

3. Click Save.

Responding to chat invitations

If you are invited to chat, a chat invitation is displayed that shows the name of the user inviting you to chat.

Chat invitation

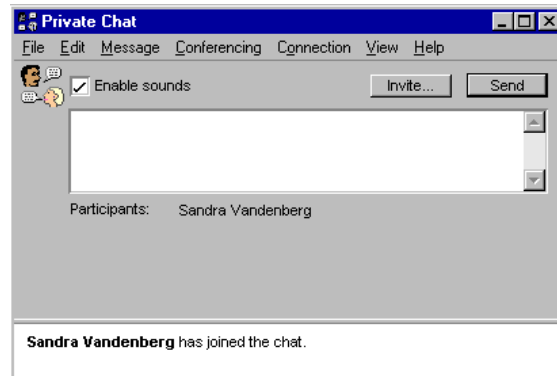


To decline the chat invitation, click Decline. Participants are not notified that you have declined the invitation.

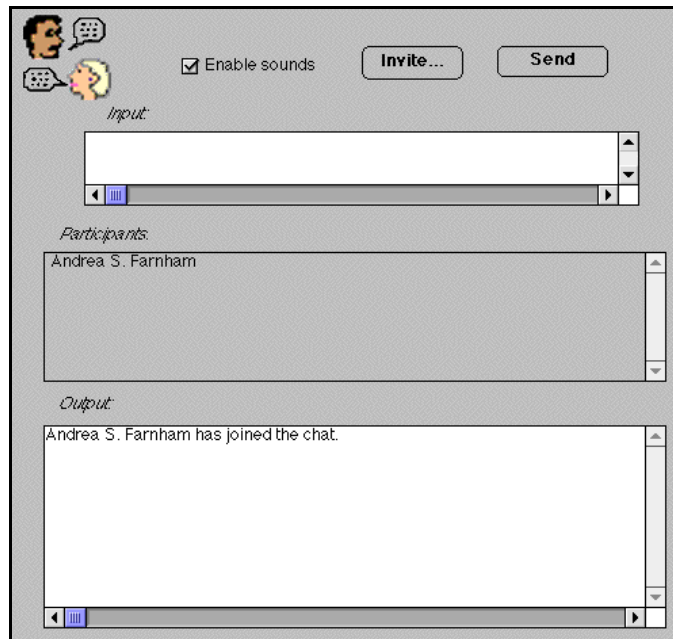
To join the chat, click Accept. The chat window opens and your name is added to the Participants list in the chat windows of all other participants.

Tip In FirstClass, before you respond to a chat invitation, or during the chat, you can open the résumé of the person who invited you, or any other participant, to see more information about them. To do this, double-click the person's name in the Participants list.

Chat window (FirstClass)



Chat window (web)



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If you are engaged in multiple chats in FirstClass, you can switch between them by clicking the appropriate chat window.

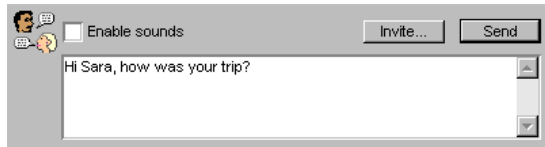
Contributing to chats

To contribute to a chat:

1. Type your comment in the input area of the chat window.

Joining public chats

Chat input area (FirstClass)



2. Click Send.

As participants enter the chat and contribute to it, the chat transcript fills with information.

Chat transcript

Sandra Vandenberg has joined the chat.
Roy Allen has joined the chat.
Sandra Vandenberg: Hi Roy, have you had a chance to read that report yet?
Roy Allen: Not yet. I'll make sure I do that today.

You can capture the chat transcript by copying it to the clipboard or, in FirstClass, saving it as a plain text file. To save it as a text file, choose File > Save As.

You can also invite other users to join the chat, as described in “Starting private chats” on page 195.

When you are finished with the chat, leave it by closing the chat window (FirstClass) or going to another page (web). Other chat participants are notified that you have left the chat.

Joining public chats

Public chats are often used to discuss a particular topic. When your administrator creates public chats, they appear inside conferences or folders.

Public chat icon



When a public chat has active participants, there is a red chat balloon beside its icon (FirstClass) or it is flagged (web).

Public chat with participants
(FirstClass)



To join the chat, double-click it (FirstClass) or click it (web).

Starting private chats

You can start private chats both in FirstClass and using a web browser.

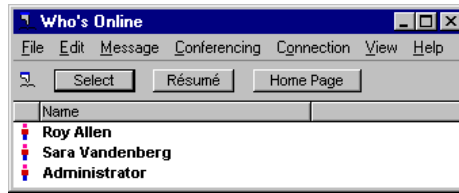
Starting private chats (FirstClass)

To start a private chat using FirstClass:

1. Choose File > Open > Private Chat.
2. Click Invite to invite users to your chat.

The Who's Online window opens, listing users who are currently connected to your server and will accept chat invitations. As is the case for the Directory, you can view these users' résumés and home pages from the list.

Who's Online



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Note You can display a list of who's online at any time by choosing Conferencing > Who's Online.

3. Select the users you want to invite.

If you are using a chat type other than text, you can only invite users whose names are underlined. For more information on the types of chats available to you, contact your administrator.

4. Click Select.

Selected users receive chat invitations. If they accept, their names appear in the chat transcript. If they decline, no response appears.

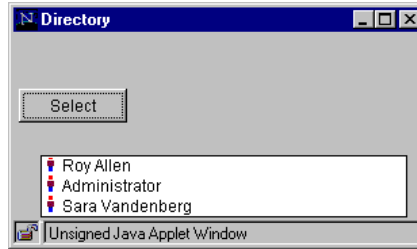
Starting private chats (web)

To start a private chat using a web browser:

1. Click Chat.
2. Click Invite to invite users to your chat.

3. The Directory window opens, listing users who are currently connected to your server.

Directory (web)



4. Select the user you want to invite.
5. Click Select.

Note You can also invite someone to chat from the Directory or Who's Online page. To do this, click the Chat button beside the person you want to invite.

The selected user receives a chat invitation. If the user accepts, you will see the user's name appear in the chat transcript. If the user declines, no response appears.

Working with documents

As described in Chapter 2, “FCIS basics”, you can create documents as well as messages. Because documents do not expire by default, and can be updated after they are created, they are useful for posting information on a permanent basis (for example, information about the purpose of a conference).

You can create a document in a conference, folder, your Mailbox, or your Desktop. You can use the standard document form, which has a blank body, or, using FirstClass, a special document form with preset fields.

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Creating standard documents

Creating documents (FirstClass)

To create a standard document using FirstClass:

1. Open the object (for example, conference) where you want to store the document.
2. Choose Message > New Document.
3. Type and format the document text as you would the body of a message.

To insert a page break, choose Edit > Insert > Insert Page Break.

4. Close the document.
5. *optional*
Give your document a name, subject, abstract, and keywords.

Pull down the split bar and fill in the fields you want. The Abstract and Keywords fields help refine searches. Separate keywords with spaces.

If you did not fill in the Name and Subject fields on the document form:

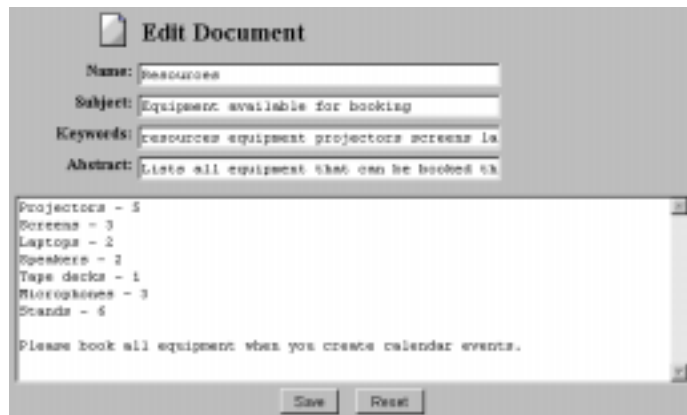
6. Choose File > Properties (Windows) or Get Info (Mac OS) to name the document and give it a subject.
7. Close the Info window and save your changes.

Creating documents (web)

To create a standard document using a web browser:

1. Open the object (for example, conference) where you want to store the document.
2. Click New Document.

New document form (web)



Edit Document

Name:

Subject:

Keywords:

Abstract:

Projectors - 5
Screens - 3
Laptops - 2
Speakers - 2
Tape decks - 1
Microphones - 3
Stands - 6

Please book all equipment when you create calendar events.

3. Fill in the following fields as desired:

Name	the document name
Subject	the document subject
Keywords	index terms to help refine searches Separate each term with a space.
Abstract	a document summary to help refine searches

Note These fields are only visible when you create or edit a document.

4. Type the document text in the input area.
5. Click Save.

Creating documents using special forms

Applies to FirstClass only.

To create a document using a special form:

1. Open the object (for example, conference) where you want to store the document.
2. Choose Message > New Document Special, then the form you want to use to create this document.

As for messages, you can do this to preview the available document forms. If you do not want to continue creating a document with a particular form, choose File > Delete with the document still open.

3. Fill in the form.
4. Close the document.
5. Choose File > Properties (Windows) or Get Info (Mac OS) to name the document and give it a subject.
6. Close the Info window and save your changes.

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Updating documents

To update a document using FirstClass, simply open it, make your changes, then close it. If you are not able to make changes, the document may be protected. For information on how to unprotect a document long enough to update it, see “Changing object information” on page 219.

To update a document using a web browser:

1. Open the document.
2. Click Edit Form.

3. Make your changes.
4. Click Save.

Saving documents as text files

Applies to FirstClass only.

You can save a document to your computer as a plain text file in the same way you would a message. For details, see “Saving messages as text files” on page 96.

Providing information about yourself

You can provide other users with information about yourself by creating a résumé. Using FirstClass, you can also create a home page that users can view with a web browser.

Creating your résumé

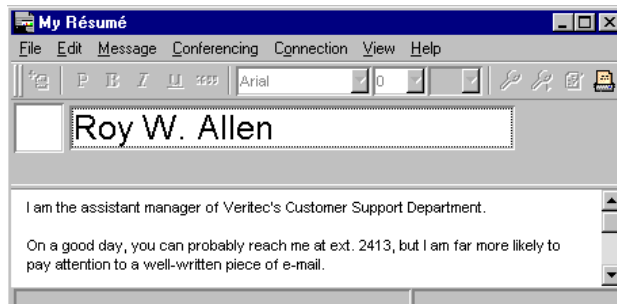
Every FCIS user has a résumé. Your résumé is blank until you update it.

Creating résumés (FirstClass)

To add personal information to your résumé using FirstClass:

1. Choose File > Open > Résumé.

Résumé (FirstClass)



2. Type your name in the top input area of the résumé.
3. *if you want to add your picture*
Paste your picture from the clipboard into the top left corner.
4. Type any information that you think would be useful to other users in the bottom input area of the résumé.

For ideas about what to write, look at other users' résumés.

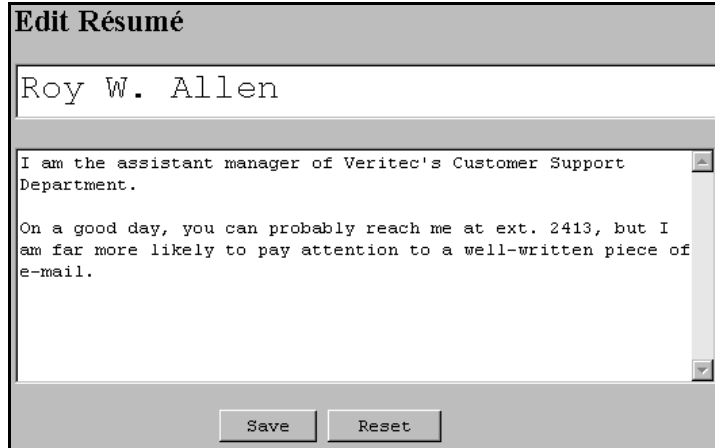
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Creating résumés (web)

To add personal information to your résumé using a web browser:

1. Click Preferences, then Edit Résumé.

Résumé (web)

A screenshot of a web browser window titled "Edit Résumé". The window has a light gray header bar with the title. Below the header is a text input field containing "Roy W. Allen". Underneath the input field is a larger text area containing two paragraphs of text: "I am the assistant manager of Veritec's Customer Support Department." and "On a good day, you can probably reach me at ext. 2413, but I am far more likely to pay attention to a well-written piece of e-mail." At the bottom of the window are two buttons: "Save" and "Reset".

2. Type your name in the top input area of the résumé.
3. Type any information that you think would be useful to other users in the bottom input area.
For ideas about what to write, look at other users' résumés.
4. Click Save.

Updating résumés

You can update your résumé at any time by following the same procedure as you did for creating it.

Viewing others' résumés (FirstClass)

To view another user's, a conference's, or a calendar's résumé using FirstClass:

1. Select the appropriate name in:
 - the Directory (choose Conferencing > Directory)
 - a Who's Online list (choose Conferencing > Who's Online)
 - the To, Cc, or Bcc fields of a message
 - the Participants list in a chat window

- a message or calendar event history.

2. Choose File > Open > Résumé.

Shortcut Double-click the name.

Viewing others' résumés (web)

Using a web browser, you may be able to view another user's, a conference's, or a calendar's résumé through the Directory. This is described in "Viewing additional information" on page 106.

Creating a home page

Note Using a web browser, you cannot create a home page folder; however, you can create documents within this folder.

A home page folder contains material you want others to view using their web browsers. FCIS publishes the contents of your home page folder on the web.

You can only have one home page folder. You can rename or delete this folder, but do not move it off your Desktop, or it will not work properly. If you inadvertently move this folder off your Desktop, you can move it back, and it will work again.

To open your home page folder using FirstClass, choose File > Open > Home Page. A home page folder is placed on your Desktop, if it is not already there.

Creating content for your home page

To create content for your home page, you can:

- drag FCIS folders, documents, and messages, as well as links to other web pages or FCIS servers (URL links) into your home page folder

For information on URL links, see "URL links in messages and documents" on page 212.

- store shortcuts to conferences by pressing Shift while you drag them to your home page folder

Web users will only be able to view conferences if your administrator has set up these conferences to allow this. Web

users who are not recognized by the FCIS server will be asked to log in when they try to access a restricted conference.

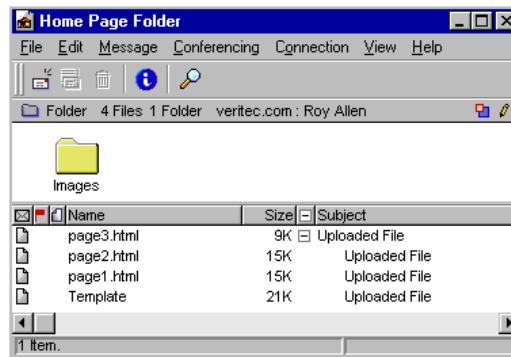
- upload plain text files directly to your home page

These files can contain HTML code.

- create documents directly in your home page folder.

These documents can contain HTML code. When you create these documents using FirstClass, you may find special document forms useful, because these forms are designed to look good when viewed with a web browser. For instructions on using these forms, see “Creating documents using special forms” on page 199.

Home page folder (FirstClass)



Home page folder (web)

Folder: Home Page Folder 1-4 of 4 Files 1 Folders			
Subject	Size	Name	Last Modified
Uploaded File	9	page3.html	6/23/97
Uploaded File	15	page2.html	6/23/97
Uploaded File	15	page1.html	6/23/97
Uploaded File	21	Template	6/23/97

HTML documents

Documents containing HTML code that are in your home page folder look like source code when you create them, but are rendered as normal web pages when opened with a web browser.

To pass HTML code to a web browser unaltered, so that it will render properly on the web, format the HTML code by selecting it, then choosing Edit > Style > Literal HTML. If you view text

formatted with this style in FirstClass, it is in fixed-pitch, plain text.

An HTML document can include URL links to other documents and image files that are located in your home page folder, as well as images inserted using FirstClass.

Specifying a default document

You can designate an HTML document as your default document. This document will be the first one opened when users access your home page over the web, and you can design it to link to the other contents of your home page folder.

If you do not designate a default HTML document, anyone opening your home page over the web will see the entire contents of your home page folder, just as you see them in FirstClass.

To make an HTML document the default, you must give it one of the following names:

- index.htm or index.html
- home.htm or home.html
- default.htm or default.html.

To make a document that was created using a special document form the default, you must name it home page.

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Viewing others' home pages

As described in “Viewing additional information” on page 106, you can see the contents of a user’s home page folder through the Directory. Any HTML code viewed this way will look like source code.

To view a user’s home page rendered properly over the web, you need to know the user name or mail alias and the domain name of the server for this user. Type the home page address in the address field of your web browser, using the following format:

`http://domainname/~firstname_lastname/`

– or –

`http://domainname/~alias/`

**Examples of viewing
home pages**

To see Michael Hill's home page at www.firstclass.com, using his user name, you would type
http://www.firstclass.com/~Michael_Hill/

To see Michael's home page using his mail alias (his e-mail address is michaelh@firstclass.com), you would type
<http://www.firstclass.com/~michaelh/>

Organizing objects

Folders

Applies to FirstClass only.

You may be able to create folders to store and organize your messages and documents. These folders work like the ones you are used to in Windows or Mac OS. You can nest folders within folders or conferences. There are some limitations to the way folders work compared to conferences. For a comparison of the two, see “Conferences” on page 8.

Creating folders

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To create a folder:

1. Open your Mailbox, or a conference or folder where you have the authority to create subfolders.
2. Choose File > New > New Folder.

A New Folder icon is displayed in the upper pane of the window.

3. Name your new folder.

Select the New Folder icon, choose File > Properties (Windows) or Get Info (Mac OS), then type the folder name at Name.

Shortcut Click the name of the New Folder icon twice to make it editable, type the folder name, then press Tab.

4. *optional*
Change other information about the folder as necessary.

For instructions on changing this information, see “Changing object information” on page 219.

5. Close the Info window and save your changes.

Moving messages into folders

You cannot address messages directly to folders. The only way to get messages into folders is to move them there. For information on moving messages, see “Moving and copying objects” on page 221.

The default expiry date for messages in a folder is determined by the default set for the conference within which the folder is located.

Navigation aids

Applies to FirstClass only.

There are several ways FirstClass lets you open objects directly:

- Desktop shortcuts open conferences or folders that are nested within other conferences
- URL links to FCIS servers or web pages can be placed in:
 - messages or documents
 - link objects that you create in conferences or folders
 - link objects that you create in a special bookmarks folder.

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Desktop shortcuts

If you monitor a conference or folder frequently, you may want to put a copy of its icon directly on your Desktop. This copy acts much like a standard Windows shortcut or Mac OS alias, giving you direct access when you double-click the icon. It is flagged when there is unread mail.

To add a shortcut to your Desktop:

1. Select the conference or folder for which you want a shortcut.
2. Choose Conferencing > Add to Desktop.

Shortcut Press Shift and drag the conference or folder to your Desktop. You can also create shortcuts in folders using this method.

If you delete a Desktop shortcut, it has no effect on the original conference or folder.

To find out where the original conference or folder is located, select the shortcut, then choose File > Properties (Windows) or Get Info (Mac OS). The path to the original is shown at Where.

URL links in messages and documents

URL links are addresses for web pages, or for conferences or folders on FCIS servers. When a URL link is clicked or double-clicked, FCIS opens the web page, conference, or folder. Bookmarks are a type of URL link. In the case of links to web pages, clicking the link causes your web browser to launch and open the appropriate web page.

You can use URL links within the text of messages and documents to link to FCIS servers or web pages. Message recipients must also be running FCIS for these links to work.

Adding URL links for web pages

To include a URL link to a web page in a message or document, type the URL in the appropriate format.

For example, to link to FirstClass' web page, type:
`www.firstclass.com`
– or –
`http://www.firstclass.com`

Adding URL links for servers

To include a URL link to a conference or folder in a message or document, type the link in the following format:
`fcip://server name/conference or folder`

For example, to link to a Budgets conference at Veritec, you would type:
`fcip://fc.veritec.com/budgets`

How URL links behave in documents

In a document, the cursor changes to a hand when it is over a URL link.

To activate a link while the document is in edit mode, click the link, then choose File > Open > Open Link.

To activate a link when you cannot edit the document, click the link.

How URL links behave in messages

In a message, a URL link is formatted according to the recipient's link style preferences. Formatting does not take place until the message is sent.

Formatted link

visit FirstClass' web site at www.firstclass.com and

To activate a link before a message is sent, click the link, then choose File > Open > Open Link.

To activate a link after a message is sent, click the link. If you are linking to another server, the Login screen for that server opens.

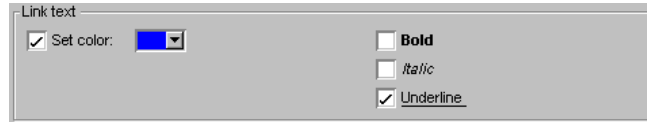
Changing the link style

To change the way URL links look in messages that you receive:

1. Choose Edit > Preferences.
2. Choose the font attributes you want at Link text on the Content - Display tab.

Selecting the checkbox at Set color tells FirstClass to use the color that you select in the corresponding field.

Link text preferences



3. Click OK.

Link objects

You can create link objects within conferences and folders. A link object contains a URL link to a web page or an object on an FCIS server, and provides convenient access to the link directly from the conference or folder.

To use the URL link in a link object, double-click the link object.

Adding link objects for web pages

To add a web page link object to a conference or folder:

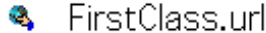
1. Open the conference or folder where you want to save the link object.

2. Go to a location that contains the URL link you want to store in the link object.

You must go to a location with a link to the web page; you cannot go directly to the web page to save a link to it.

3. Drag the link to the lower pane of the conference or folder window.

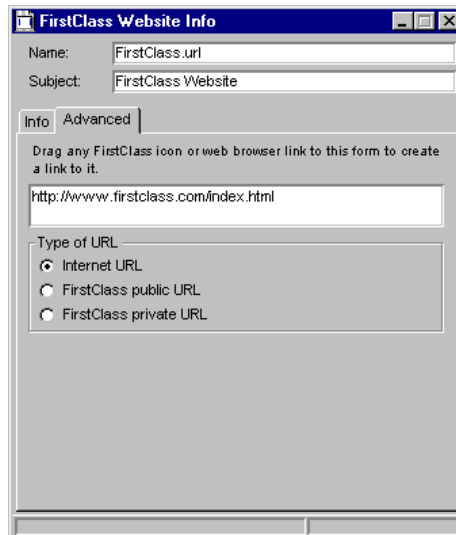
Link object (to web)



Changing link object information (to web)

You can change the name or expiry date of your link object, and add a subject, as described in “Changing object information” on page 219. In addition, link objects have an Advanced tab in the Info window that lets you change the address of the URL link.

Link object info (to web)



To change the URL link address, type the new address in the input area of the Advanced tab, or drag a different web page link to this area.

Note If you are using Mac OS, make sure the input area is not selected before dragging a link, or you will append the link rather than replacing the old link.

Internet URL is automatically selected for you at Type of URL.

Adding link objects for FCIS servers

You can add a link to another FCIS object, such as a conference, folder, or message. This object can be located on another FCIS server or on your own server.

Adding links to another server

To add a link object for an object on another FCIS server:

1. Open the conference or folder where you want to save the link object.
2. Log into the server that contains the object to which you want to link (the link target).
3. Drag the target object to the lower pane of the window where you want to save the link object.

Link object (to server)



News

Adding links (bookmarks) to your own server

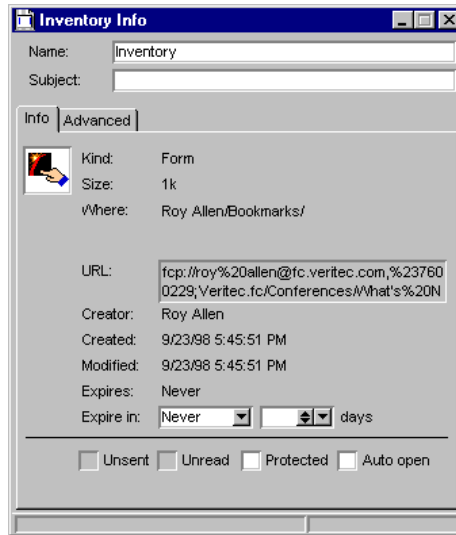
You store link objects for objects on your own server in a special bookmarks folder. Link objects in the bookmarks folder are called bookmarks.

Tip If you want to keep all your link objects in one place, you can also create link objects for web pages and other servers in your bookmarks folder. Create these link objects as you would any other link objects for web pages and other servers.

To create a bookmark to an object on your own server:

1. Select the object you want to bookmark.
2. Choose Conferencing > Add to Bookmarks.

The Info window opens with a description of the bookmark.



3. *if you do not want the default bookmark name*
Type the new bookmark name at Name.
4. *optional*
Supply a subject at Subject.
5. Close the Info window and save any changes.

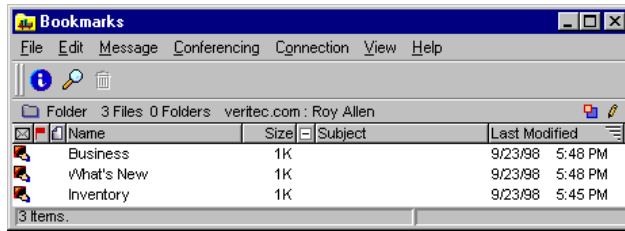
The bookmark is added to your bookmarks folder. If this is the first bookmark you have created, and a bookmarks folder is not already on your Desktop, a folder is placed there. This folder may also be added to your Desktop when you choose File > Open > Bookmarks.

Using bookmarks

To use a bookmark:

1. Choose File > Open > Bookmarks or double-click the bookmarks folder.

Bookmarks folder

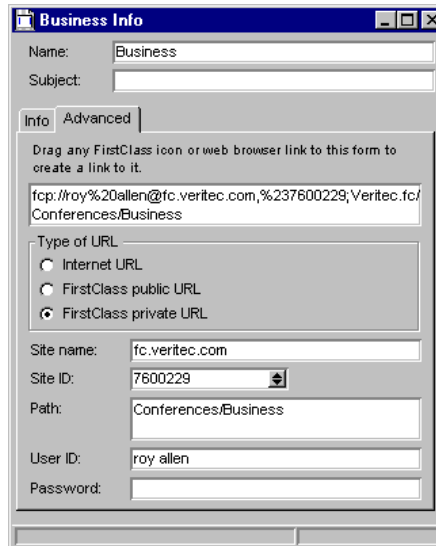


2. Double-click the bookmark for the object you want to open.

*Changing link object
information (to servers)*

You can change the name or expiry date of your link object, and add a subject, as described in “Changing object information” on page 219. In addition, link objects have an Advanced tab in the Info window that lets you change the address and other server information of the URL link.

Link object info (to server)



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To change the URL link address, type the new address in the upper input area of the Advanced tab, or drag a different object, such as a conference, to this area. If you drag a different object to the tab, information on the tab is updated automatically.

Note If you are using Mac OS, make sure the input area is not selected before dragging a link, or you will append the link rather than replacing the old link.

You can also update the following fields on this tab:

Type of URL FirstClass private URL is automatically selected for you

This means only you can use this link object. If you want this link object to be usable by others, select FirstClass public URL. If you do this, the User ID and Password fields are removed.

Site name the server domain name

Site ID the serial number of the server

Path the path to the target conference or folder

User ID the user ID you use to log into this server

Password the password you use to log into this server

For security, you do not need to provide this information.

Working with objects

This chapter describes:

- changing object information
- moving and copying objects
- opening objects with a single click
- deleting (and undeleting) objects
- searching for objects.

Changing object information

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Applies to FirstClass only.

You may be able to change some information, such as name, icon, and expiry date, for an object.

Changing information for objects in multiple locations

If you post a message to two conferences, the message is stored in your Mailbox, with links to this message in the two conferences. Each instance of the message, whether the actual copy or a link, has its own set of information.

Changing the information in one of these locations does not change the same information in any other locations. You may change the subject of the message in your Mailbox, but the original subject will remain in the conferences. Also, you may not have authority to change information in certain conferences, even though you sent the message.

If you need to change information in all locations, go to your Mailbox and unsend the message, change the information, then send the message again.

Changing object information

To change information about an object:

1. Select the object.
2. Choose File > Properties (Windows) or Get Info (Mac OS) to open the Info window.

Info window



3. Change information as required in this window.

These are guidelines for fields that may not be obvious:

- | | |
|----------------------|---|
| Name | Type a maximum of 23 characters.
In the case of a message or conference item, this is originally the sender or recipient. |
| Icon | To change an icon, click it, then click the icon you want in the popup list. |
| Expiry period | <i>not applicable to folders</i>
FCIS assigns an expiry date to every object when it is created. After this date, FCIS deletes the object. Your administrator defines the default number of days after which an object will expire.

To change the expiry date, choose the length of time you want to keep this object. If you choose Other, type the number of days after which you want the object to expire at Days left. For all other choices, the number of days is ignored. |

Protected	Protects the object, so that no one can change, move, or delete it.
Auto open	Makes the object open automatically if it is unread.
Stationery	Turns a message into personal stationery. For information on personal stationery, see “Personal stationery” on page 100.
These fields are display only	
Kind	the object type Objects with a type of File are uploaded files. They cannot be viewed directly, but can be downloaded to your computer or attached to messages.
Where	the path to the object’s location
Character set	the character set used when the object was created

4. Close the Info window and click Save.

Moving and copying objects

Applies to FirstClass only.

You can move and copy objects as you do in other standard applications. To move an object, drag it. To move an object one pixel at a time, select it, then use the arrow keys while pressing Control-Shift (Windows) or Option (Mac OS). To copy an object, press Control (Windows) or Option (Mac OS) while dragging it.

Note If your administrator has not given you permission to move a particular folder or conference, FCIS will try to create a shortcut to the object instead. Shortcuts are described in “Desktop shortcuts” on page 211.

When you move a message into a conference or your Mailbox, the message’s expiry date changes to the default expiry date for objects in that conference or your Mailbox. You can reset the changed expiry date as described in “Changing object information” on page 219.

Opening objects with a single click

Applies to FirstClass only.

Normally, you open an object by double-clicking it. To make objects in a particular window pane open with a single click:

1. Click the pane you want to affect.
2. Choose View > Change View Properties.
3. Click the Icons tab.
4. Select Open icons with single click.
5. Click OK.

Note Only the icon portion of an object is affected by this preference. To select an object instead of opening it, click any text associated with the object (such as an icon's name). To move an object, drag its name.

Deleting objects

You can delete objects in both FirstClass and using a web browser; however, with a web browser, you can only delete messages, documents, and calendar events and tasks.

When you delete an object, that object is marked for deletion, but is not immediately removed from the server. FCIS physically removes deleted objects when it collects the trash. Your administrator schedules trash collection times.

Deleting objects (FirstClass)

To delete an object using FirstClass:

1. Select the object.
2. Choose File > Delete, or press Delete.
3. Click Delete when prompted.

If prompted again, click Delete once more.

When you delete a folder, conference, or calendar, you also delete all objects contained within.

Tip If you need to delete a message that you sent to several conferences, go to your Mailbox and unsend the message, then delete the message. If you do not unsend the message first, you will have to delete it from every location to which you sent it. In addition, you may not have authority to delete it from all conferences.

If you cannot delete an object

If you cannot delete an object, and you know that your administrator has given you authority to delete it, the object may be protected. To unprotect the object so that you can delete it, clear Protected in the Info window as described in “Changing object information” on page 220.

Restoring deleted objects

Before the trash is collected, you can restore a deleted object. To do this:

- 1. Open the window that contained the deleted object.
- 2. Choose View > Show Deleted Items.

All deleted objects that have not yet been removed during trash collection are displayed, with trash can icons beside them.

Deleted objects

	Name	Size	Subject	Last M
	To Administrator	1K	Re: Your account status	8/25/9
	Administrator	1K	Your account status	5/20/9
	To Sandra Jones	1K	Status Meeting	8/25/9

Note You cannot open an object that is marked for deletion.

- 3. Select the object you want to restore.
- 4. Choose File > Undelete.

When you have finished restoring deleted objects, you can hide the objects that are still marked for deletion by choosing View > Hide Deleted Items.

Deleting objects (web)

To delete an object using a web browser:

- 1. Open the object.

2. Click Delete.

Restoring deleted objects

You can restore a deleted object, as long as it is still open. To do this, click Undelete.

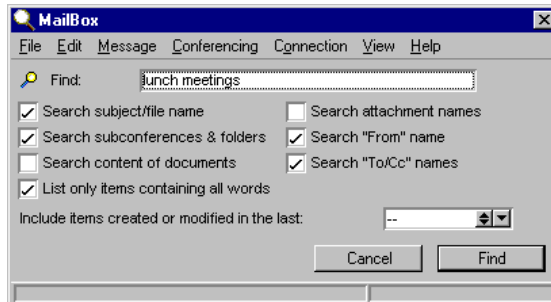
Searching for objects

You can search your Mailbox, conferences, folders, and external folders or drives for messages, documents, or uploaded files that contain specific text. To do this:

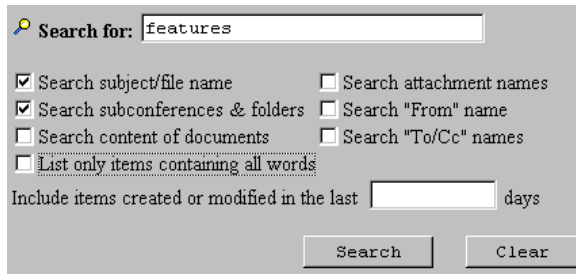
1. Open the window you want to search.
2. Choose Edit > Find (FirstClass) or click Local Search (web) to open the search options.

Note On the web, Local Search searches the open conference or folder and all its subconferences and subfolders. To search the whole web site, click Site Search instead.

Search options (FirstClass)



Search options (web)



3. Type the text you want to find at Find (FirstClass) or Search for (web).
4. Specify your search options, keeping in mind that the more narrowly you focus the search by turning on these options, the more relevant the search results are likely to be:

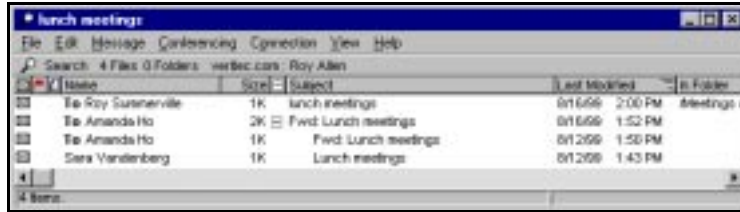
Search subject/ file name	searches the subjects of messages or documents, and the names of uploaded files
Search subconferences & folders	searches all items, subconferences, and subfolders in the window This may increase search time significantly.
Search content of documents	searches the contents of messages and documents This may increase search time significantly.
List only items containing all words	retrieves only items that contain every word in your search text If this is cleared, your search text is treated as a phrase, and FCIS will only retrieve items that contain exactly this phrase.
Search attachment names	<i>not applicable to external folders or drives</i> searches the names of files attached to messages To find all messages with attachments, select this and leave Find/Search for blank.
Search "From" name	<i>not applicable to external folders or drives</i> searches message senders' names This is useful for finding all messages sent by a specific person.
Search "To/Cc" names	<i>not applicable to external folders or drives</i> searches recipients' names in the To and Cc fields of messages
Include items created or modified in the last	choose a time period, or type the number of days, to retrieve only items created or modified during this period

5. Click Find (FirstClass) or Search (web).

Searching for objects

The search summary window opens. As items are found, they are listed in this window.

Search summary window
(FirstClass)



Search summary window (web)

	Subject	Size	Name	Last Modified	In Folder
	Uploaded File	2	features_large.html	1/16/98	/product/fcis/
	Uploaded File	26	features.html	1/23/98	/product/fcis/
	Uploaded File	2	features_large.html	1/16/98	/product/fcis/
	Uploaded File	26	features.html	4/2/98	/product/fcis/

If you are using FirstClass to search

When searching for objects using FirstClass:

- the name of the object currently being searched is displayed in the top right corner of the search summary window
- you can open items in the search summary window before the search finishes
- searching takes place in the background; you can do other things in FirstClass during a search
- FirstClass notifies you when the search is complete
- you can cancel a search in progress by closing the search summary window.

If you are using a web browser to search

To clear all search options, click Clear.

Functionality you can add to FirstClass

Working offline

Not available in Windows 3.1

Normally, you must be connected to an FCIS server to work with the objects on your Desktop. Over expensive communication links such as long-distance telephone connections, this can become costly. For this reason, SoftArc provides a FirstClass Personal application that lets you do many of the things you normally do, without being connected to a server full time.

Note You can only use FirstClass Personal if you have a regular user license. If you have a remote user license, you cannot use this component.

If you are unsure whether you can use FirstClass Personal, contact your administrator.

FirstClass Personal creates copies of your Mailbox, conferences that you want to see offline, and the Directory information you want to see offline in a Personal post office on your computer.

FirstClass Personal connects to your server at the times you specify. When connected, this application retrieves information (such as new messages or Directory information) from the server and places it in your Personal post office. This is called replication.

Note If you have an expensive connection, check the FirstClass Personal configuration to make sure you will not connect more frequently than you want. For information on checking and changing configuration values, see “Configuring FirstClass Personal” on page 233.

These are the things you can do with FirstClass Personal:

- create messages, using the normal message forms
- read messages and conference items
- attach files to messages, and save files attached to messages
- search your Mailbox or conferences
- send and retrieve messages
- use calendaring
- create and use an offline address book and a bookmarks folder.

These are things you cannot do with FirstClass Personal:

- participate in chats
- upload files directly into folders.

Note To use features of FirstClass that are only available with special licensing, you must have a compatible version of the FirstClass client installed on your computer, and you must be connected to a server that is licensed for those features. If you are unsure whether you can perform certain tasks offline, check with your administrator.

Installing FirstClass Personal

If you chose the Easy Install (Mac OS) or Typical setup (Windows) when you installed the FirstClass client on the computer from which you want to run FirstClass Personal, this application has already been installed. All you need to do is make sure you have a properly configured connection to the FCIS server.

To install FirstClass Personal, run the FirstClass client custom installation. Install both the FirstClass Personal application and Personal Post Office.

Starting FirstClass Personal

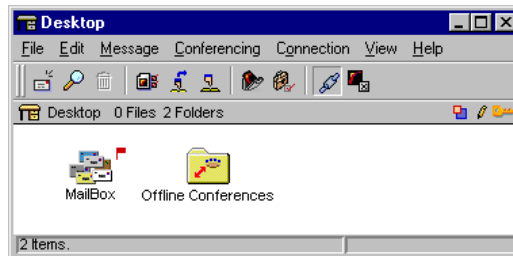
To start FirstClass Personal if you are currently working online, choose Connection > Work Offline > Connect Offline, then click Login at the Work Offline Login screen.

To start FirstClass Personal if you are not currently working online, start FirstClass to open the FCIS Login screen. Supply the settings file, user ID, and password that you want to use to connect to the server when working offline, then click Work Offline.

If this is the first time you have used FirstClass Personal, the Registration form opens, showing the settings file, user ID, and password with which you logged in. Ensure that this is how you want to connect to the server when working offline, then click OK.

Your offline Desktop opens.

Offline Desktop



Your offline Desktop looks much like your online Desktop. It contains an offline version of your Mailbox and an Offline Conferences folder. For information on setting up offline conferences, see “Specifying your offline conferences” on page 232.

Note The first time you work offline, FirstClass Personal may take several minutes to replicate information offline.

Setting up your offline conferences

To save disk space, FirstClass Personal does not automatically show all the conferences to which you have access online. You must tell FirstClass Personal which conferences you want to work with offline. You will have the same permissions for a conference offline as you do online; if you are not allowed to post to a conference online, you will not be able to do so offline.

Specifying your offline conferences

To tell FirstClass Personal which conferences to show offline:

1. Log into your FCIS server.
2. *if you have not yet started FirstClass Personal*
Choose Connection > Work Offline > Open Offline Conferences.

The Offline Conferences window opens, and this folder is placed on your Desktop, if it is not already there.

Offline Conferences icon



3. Select a conference that you want to access offline.
4. Choose Conferencing > Add to Desktop.
5. Drag the newly created conference icon from your Desktop to the Offline Conferences folder.
6. Add icons to your Desktop and drag them to your Offline Conferences folder until you have specified all the conferences you want to work with offline.

The next time you work offline, FirstClass Personal replicates any unread messages that are in these conferences. Within the offline version of your Offline Conferences folder, you will only see those conferences that contain unread mail. FirstClass Personal only creates these conferences offline when they contain unread mail.

Note FirstClass Personal does not replicate uploaded files. It does replicate files attached to messages.

Removing offline conferences

If you no longer want to access a conference offline, delete it from both the offline and online versions of your Offline Conferences folder.

Working with messages offline**Reading and responding to messages**

You can read, save, print, forward, or reply to messages just as you would when you work online.

You receive new mail when FirstClass Personal connects to your server. At that time, copies of unread messages are replicated to your offline Mailbox and conferences. After replication, the online copies of these messages are no longer flagged as unread.

If you delete a message from your offline Mailbox or an offline conference, this does not affect the online copy of the message.

Sending messages

You can send messages just as you would when you work online. When you are addressing messages to users rather than to conferences, you can use your offline Directory to address these messages in the same way you would online.

Note Names that appear local when you work online look remote when you work offline. For example, Amanda Ho becomes Amanda Ho, Veritec Toronto in your offline Directory.

Your new messages are sent when FirstClass Personal connects to your server. To deliver a message immediately, choose Connection > Work Offline > Replicate Now.

Configuring FirstClass Personal

FirstClass Personal installs with default settings that you may never need to change. If you do want to change FirstClass Personal behavior:

1. Go to your offline Desktop.
2. Choose Connection > Work Offline > Configure Offline.

FirstClass Personal - Settings

Connection

Main settings file: c:\fcicwin\settings\veritec.fc
Secondary settings file:
Host user ID: rallen
Host password: ***

Scheduling

☒ Connect when mail is waiting to be sent Connect Now
☐ Connect when FirstClass Personal starts up Stop Replication
☐ Connect when FirstClass Personal shuts down
Connect every: 1 Hours (FirstClass Personal must be running)

Replication options

☒ Get my private unread messages on each connection
☒ Replicate my calendar on each connection
☒ Replicate offline conferences on each connection
Update my Directory information: Routes and Names
Do not replicate messages over: No Limit
Display replication status window: Always

Message cleanup

☐ Leave mail on host server after reading
Private mail expires after: 90 days
Conference items expire after: 45 days
Minimum free disk space: 1000 kBytes

Addressing - Advanced

☒ Automatically append host site name
☐ Validate site names on the host server

3. Fill in the following fields as required:

General connection information

Main settings file	the name of the settings file you normally use to connect to your server
Secondary settings file	the name of a backup settings file to use to connect to the server, in case FirstClass Personal cannot connect using your main settings file
	The connection protocol, server identification, and so on, may be different in this settings file.
Host user ID	your user ID on this server

Host password your password on this server

If you change your password while working online, be sure to change this field as well.

Scheduling settings that control when FirstClass Personal connects to the server

- Connect when mail is waiting to be sent** connects to the server whenever you send mail
- Connect when FirstClass Personal starts up** connects to the server when FirstClass Personal starts
- Connect when FirstClass Personal shuts down** connects to the server when you quit FirstClass Personal
- Connect every** *to connect to the server on a regular basis*
specify the number of hours or minutes to wait between connections
- The Settings window also contains a Connect Now button that lets you connect to the server on demand.
- You can also connect manually by choosing Connection > Work Offline > Replicate Now.

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Replication settings that control the information that is copied from the server to your computer

- Get my private unread messages on each connection** replicates unread mail from your Mailbox whenever FirstClass Personal connects to the server
- Replicate my calendar on each connection** replicates personal calendar items whenever FirstClass Personal connects to the server
- Replicate offline conferences on each connection** replicates conference messages whenever FirstClass Personal connects to the server
- Update my Directory information** choose the Directory information you want replicated to your offline Directory whenever FirstClass Personal connects to the server:

	None	no Directory information is replicated
	Routes Only	replicates routing information from the Directory
	Routes and Names	replicates both routing information and user names from the Directory
		Conference and mail list names are not replicated.
Do not replicate messages over		specify the largest message size (in kilobytes) that you want replicated when FirstClass Personal connects to the server
Display replication status window		choose when you want to see a window that indicates whether FirstClass Personal is currently replicating information
		This is the window you see by default when you start FirstClass Personal. You can choose to see this window all the time, never, or only when replication is taking place.
	Message cleanup settings that control the amount of disk space used by FirstClass Personal	
	Leave mail on host server after reading	keeps a copy of read mail on the server
	Private mail expires after	the number of days before messages in your offline Mailbox expire
		This does not affect your Mailbox on the server.
	Conference items expire after	the number of days before items in your offline conferences expire
		This does not affect the conferences on the server.

Minimum free disk space the minimum amount of free disk space on your computer

If the amount of free disk space drops below this value, you cannot send mail, and FirstClass Personal no longer replicates information. This setting is intended to avoid the problems that can occur when your disk runs out of space.

We recommend that you specify at least 2% of your total available disk space.

Advanced addressing settings that permit you to send mail to users and servers not in your offline Directory

Automatically append host site name sends mail to users who are in the server's Directory, but not in your offline Directory

When you address mail to one of these users, FirstClass Personal adds the name of your server. For example, the user name Roy Allen would be changed to Roy Allen,Veritec.

Validate site names on the host server sends mail to people or conferences that are in your server's Directory, but not in your offline Directory

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4. Close the Settings window and save your changes.

Your Personal post office

All your offline information is contained in the Personal post office folder. This folder is called Personal Post Office on Mac OS and PPO in Windows.

It is important that you not make any changes directly to this folder or its contents, or FirstClass Personal may stop running. In this case, you might have to reinstall FirstClass Personal.

Do not:

- rename the folder

- move the folder to a different volume (Mac OS) or folder (Windows), unless you also move the FirstClass folder to the same location
- change, delete, or move anything within the folder
- add files to any subfolders within the folder, unless instructed to by your administrator.

**Backing up your
Personal post office**

Be sure you back up your Personal post office on a regular basis. We recommend at least once a week. This is a safeguard against losing your messages and offline Directory information in the event of hardware failure or data corruption.

The easiest way to back up your Personal post office is to copy the Personal post office folder to a diskette.

FirstClass Network Notifier

FirstClass Network Notifier lets you know that you have received mail whenever you are connected to your network, even if you are not connected to an FCIS server. This application works when you are not running FirstClass. You can only use FirstClass Network Notifier over an AppleTalk or IPX-compatible network; it cannot be used over TCP/IP networks or remote connections.

How FirstClass Network Notifier works

By default, FirstClass Network Notifier notifies you of new mail by beeping and opening a popup window like this:

FirstClass Network Notifier popup



You can change this behavior when you configure FirstClass Network Notifier.

Note If you are using a screen saver program that requires a password to reactivate your screen, the popup window may cause your computer to lock up. To avoid this potential problem, either turn off the popup window when you configure FirstClass Network Notifier, or turn off password protection in your screen saver program.

Installing FirstClass Network Notifier

If you chose the Easy Install (Mac OS) or Typical setup (Windows) when you installed the FirstClass client, FirstClass Network Notifier has already been installed. All you need to do is configure it.

To install FirstClass Network Notifier, run the FirstClass client custom installation.

Configuring FirstClass Network Notifier (Windows)

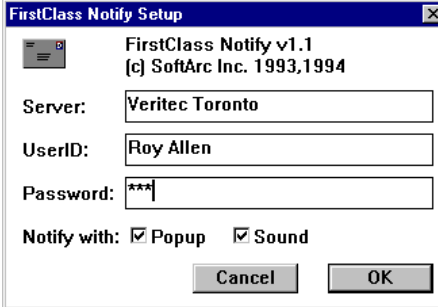
To configure FirstClass Network Notifier:

1. Start FirstClass Network Notifier.

The application starts minimized.

2. Maximize the Notifier window, then choose Setup.

FirstClass Network Notifier Setup

A screenshot of the 'FirstClass Notify Setup' dialog box. The title bar reads 'FirstClass Notify Setup'. Inside the box, there is a small icon of a document with a checkmark. To the right of the icon, the text reads 'FirstClass Notify v1.1' and '(c) SoftArc Inc. 1993,1994'. Below this, there are three text input fields: 'Server:' with the value 'Veritec Toronto', 'UserID:' with the value 'Roy Allen', and 'Password:' with three asterisks '***'. Below these fields, there is a section labeled 'Notify with:' followed by two checked checkboxes: 'Popup' and 'Sound'. At the bottom right of the dialog box are two buttons: 'Cancel' and 'OK'.

3. Fill in the following fields:

Server	the name of your server If you do not know the name of your server, contact your administrator.
User ID	your user ID on this server
Password	your password on this server
Popup	displays the FirstClass Network Notifier popup window when you have new mail
Sound	beeps when you have new mail

4. Click OK.

5. Restart Windows.

Note If you want FirstClass Network Notifier to start whenever you start Windows, add it to your Start menu or Startup program group.

Configuring FirstClass Network Notifier (Mac OS)

To configure FirstClass Network Notifier:

1. Choose Chooser from the Apple menu.

2. Select FirstClass® Notify.

3. Choose the following:

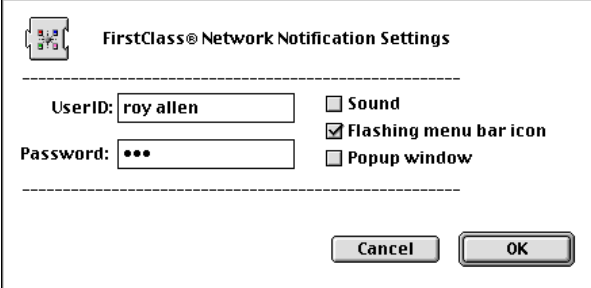
AppleTalk Zones the zone in which your FCIS server is located

Select a FirstClass® server your FCIS server

If you do not see your server listed, or do not know its name, contact your administrator.

4. Click Setup.

FirstClass Network Notifier Settings



The dialog box is titled "FirstClass® Network Notification Settings". It contains two text input fields: "UserID:" with the text "roy allen" and "Password:" with three dots. To the right of these fields are three checkboxes: "Sound" (unchecked), "Flashing menu bar icon" (checked), and "Popup window" (unchecked). At the bottom right are "Cancel" and "OK" buttons.

5. Fill in the following fields:

User ID your user ID on this server

Password your password on this server

Sound beeps when you have new mail

Flashing menu bar icon displays a flashing mail icon on the menu bar when you have new mail

Popup window displays the FirstClass Network Notifier popup window when you have new mail

- 6.** Click OK.
- 7.** *if you are running System 7.5 or later*
Ensure that the FirstClass Notify extension is selected in the Extensions manager.
- 8.** Restart Mac OS.

Configuring your FirstClass connection

Your connection protocol

When you use FirstClass, you connect to an FCIS server in one of two ways:

- over a network
- using a modem or ISDN line.

Note We assume that your connection is already set up and working properly. This book just discusses how to tell FirstClass about your connection. If you do not know what connection protocol to use, contact your administrator.

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Network connections

In a network environment, your computer is plugged into a local network that allows you to communicate with any other computer within the network.

This is the most common method for people connecting from medium to large sized businesses.

A network connection uses one of the following protocols:

- TCP/IP
- UDP/IP
- AppleTalk
- IPX.

Modem connections

If you are using a modem connection direct to your FCIS server, the modem used by your computer uses a telephone line to communicate with a modem at the server site.

A modem connection uses one of the following protocols:

- Windows modem
- FirstClass/serial modem
- Comm Toolbox
- ISDN
- Int14 Serial
- NASI Serial.

Protocol types

This chart indicates appropriate protocols for each connection type and system:

Connection type	System:	
	Windows	Mac OS
Internet	<ul style="list-style-type: none"> • TCP/IP • UDP/IP 	<ul style="list-style-type: none"> • TCP/IP • UDP/IP (PPC)
network	<ul style="list-style-type: none"> • TCP/IP • UDP/IP • AppleTalk (Windows NT) • IPX 	<ul style="list-style-type: none"> • TCP/IP • UDP/IP (PPC) • AppleTalk
modem	<ul style="list-style-type: none"> • Windows modem (TAPI) (Windows 95/98/NT) • FirstClass modem • Int14 Serial (Windows 3.1) • NIASI Serial (Windows 3.1) 	<ul style="list-style-type: none"> • serial modem • Comm Toolbox • Comm Toolbox Serial
ISDN	<ul style="list-style-type: none"> • ISDN (CAPI) 	<ul style="list-style-type: none"> • Comm Toolbox

Additional notes on protocols

TCP/IP

Use this protocol if you are using a modem to connect through an Internet Service Provider (ISP) over the Internet.

UDP/IP

This is an alternative to TCP/IP when your connection is slow. It optimizes data flow to provide better interactive response. This protocol only works on PPC computers; it does not work on 68K machines.

Windows modem

Windows NT 4.0, Windows 95, or later include TAPI, a technology that lets you configure modem connections using system information already known to Windows.

The information you need to supply

<i>FirstClass modem</i>	Use this protocol if you want to use FCIS' own Windows modem handling. You will have to supply more information than you would for a Windows modem connection.
<i>ISDN</i>	ISDN is a digital telephone line that provides greater speed than a regular telephone line.
<i>Int14 Serial/NASI Serial</i>	These protocols are rarely used today. They apply to shared modems in modem pools. Int14 Serial is used with the common PC BIOS interrupt 14. NASI Serial is used with Novell networks. For information on setting up FirstClass for these protocols, contact your administrator.

The information you need to supply

There are two types of information you need to supply when configuring a connection:

- service setup information

This includes information such as the connection protocol you will use, and the server you want to access.

- connection information.

This includes information such as the port, modem type, or phone type you use.

Not all connection protocols require you to supply connection information.

What you need to know

If you do not have the following information, contact your administrator.

For this protocol	You need to know
TCP/IP UDP/IP	<ul style="list-style-type: none"> • whether you are connecting directly to the server or through a proxy server (your company may use a proxy server if your internal network is protected by a firewall) • the server's IP address or domain name • the TCP/IP port number of the server • <i>if you are connecting through a proxy server</i> the proxy server's IP address and port number
AppleTalk	<ul style="list-style-type: none"> • the server's network name • the name of the AppleTalk zone in which the server is located, if it is different from your computer's zone
IPX	<ul style="list-style-type: none"> • the server's network name
Windows modem (TAPI)	<ul style="list-style-type: none"> • the server's phone number • <i>if you have multiple modems configured on your computer</i> the modem you want to use for this connection • <i>if you require a special connection script</i> the name of your connection script file (these are described in AdvConf.pdf on the FCIS CD) • <i>if your modem supports multiple lines</i> the line number you want to use for this connection
FirstClass/serial modem	<ul style="list-style-type: none"> • the server's phone number • your modem type • the port to which your modem is connected • your phone type (dial or touch tone) • <i>if you require a special connection script</i> the name of your connection script file (these are described in AdvConf.pdf on the FCIS CD)

After gathering your connection protocol information

For this protocol	You need to know
Comm Toolbox	<ul style="list-style-type: none">• the server's phone number• for other information you need, see your Comm Toolbox documentation
ISDN	<ul style="list-style-type: none">• the server's phone number• the ISDN protocols that are appropriate for your ISDN adapter and the server to which you are connecting

Where information is saved

Service setup information is stored in your settings file. Settings files are located in FirstClass' Settings folder.

Connection information is stored in the .fcp files that are located in FirstClass' FCP folder. There is one .fcp file for each connection type. Normally, all settings files that use the same connection type obtain their connection information from the same .fcp file.

If you need different behaviors for the same connection type (for example, modem connections with the speaker on in one case and off in another), you can create additional .fcp files as described in the advanced configuration information that is included in AdvConf.pdf on the FCIS CD.

After gathering your connection protocol information

Once you have all the information required for your connection protocol, go to Chapter 35, "Configuring service setup information" and follow the instructions there to supply your service setup information.

For those protocols that require additional connection information, that chapter will lead you to the instructions for supplying the connection information for your protocol.

Configuring service setup information

After you have determined your connection protocol, as described in Chapter 34, “Your connection protocol”, the next step in configuring your connection is to supply the service setup information appropriate for connecting to the FCIS server.

Configuring service setup information

To configure service setup information:

1. Open the FCIS Login screen.
2. Make sure the settings file you want to configure is selected at File.

If the settings file for the server is not listed here, do one of the following:

- click Browse to find and select it
- update home.fc
- create a new settings file for the server.

To create a new settings file, type the name you want to give the settings file at File. If you use Windows, make sure the name ends in .fc.

3. Click Setup.

4. Fill in the following fields:

- Connect via** your connection type
for TCP/IP
choose one of the following:
- TCP-IP.FCP - for direct connections
 - TCPIPWAN.FCP - for Windows connections through a proxy server
 - TCP-IP WAN.FCP - for Mac OS connections through a proxy server
- for UDP/IP*
choose UDP-IP.FCP
- for AppleTalk*
choose AppleTalk.FCP
- for IPX*
choose IPX.FCP
- for modems and ISDN*
choose MODEM.FCP
- User ID** type your user ID if you do not want to type it every time you log into this server
- Password** type your password if you do not want to type it every time you log into this server
- It is a serious security issue to save your password in your settings file, especially if your computer is accessible to others. For this reason, we recommend that you leave this field blank.
- Log in as guest** select this if you are not a registered user
- Log in automatically** *only applicable if you filled in your user ID and password*
logs into the server automatically as soon as the settings file is opened
- You can disable automatic login by pressing Control (Windows) or Option (Mac OS) while you open the settings file.

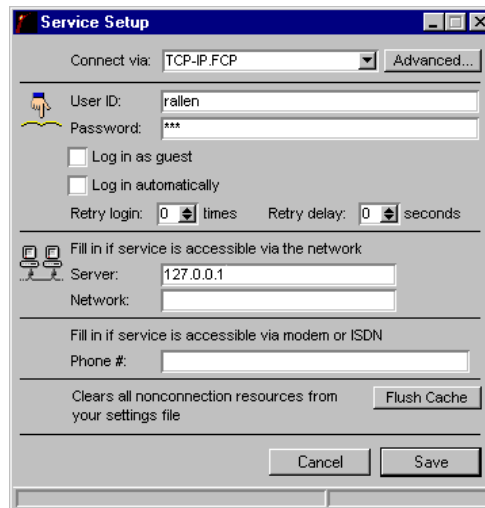
Retry login	<i>only applicable if you selected Log in automatically</i> the number of times FirstClass will retry login attempts (maximum 15) when the system is busy
Retry delay	<i>only applicable if you selected Log in automatically</i> the delay (in seconds) between login retries
Server	<i>for TCP/IP or UDP/IP</i> the server's IP address or domain name <i>for AppleTalk or IPX</i> the server's network name <i>for all other connection types</i> leave blank
Network	<i>for AppleTalk</i> the name of the AppleTalk zone in which the server is located If you are on a single zone network, or are in the same zone as the server, type *. <i>for all other connection types</i> leave blank
Phone #	<i>for modems and ISDN</i> the server's phone number Include the dialing prefixes you would use if you were phoning this number. Examples of prefixes are: 9 (followed by a comma) to dial out of your office, 1 for long distance, and an area code. <i>for all other connection types</i> leave blank

Examples of completed Service Setup windows

When you have finished filling in the Service Setup window, it will look something like this:

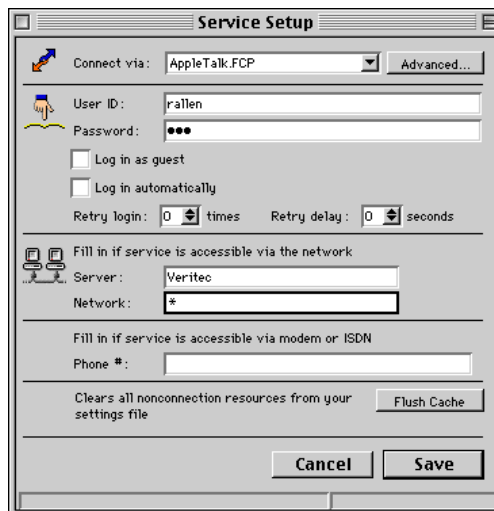
Configuring service setup information

Service Setup (TCP/IP)



The Service Setup (TCP/IP) dialog box is titled "Service Setup". It features a "Connect via:" dropdown menu set to "TCP-IP.FCP" with an "Advanced..." button to its right. Below this, there are input fields for "User ID:" (containing "ralen") and "Password:" (containing "***"). Two checkboxes are present: "Log in as guest" and "Log in automatically", both of which are unchecked. Below the checkboxes are spinners for "Retry login:" (set to 0) and "Retry delay:" (set to 0 seconds). A section titled "Fill in if service is accessible via the network" contains input fields for "Server:" (containing "127.0.0.1") and "Network:". Another section titled "Fill in if service is accessible via modem or ISDN" contains a "Phone #:" input field. At the bottom left, there is a button labeled "Flush Cache" with the text "Clears all nonconnection resources from your settings file" above it. At the bottom right, there are "Cancel" and "Save" buttons.

Service Setup (AppleTalk)



The Service Setup (AppleTalk) dialog box is titled "Service Setup". It features a "Connect via:" dropdown menu set to "AppleTalk.FCP" with an "Advanced..." button to its right. Below this, there are input fields for "User ID:" (containing "ralen") and "Password:" (containing "●●●"). Two checkboxes are present: "Log in as guest" and "Log in automatically", both of which are unchecked. Below the checkboxes are spinners for "Retry login:" (set to 0) and "Retry delay:" (set to 0 seconds). A section titled "Fill in if service is accessible via the network" contains input fields for "Server:" (containing "Veritec") and "Network:" (containing "*"). Another section titled "Fill in if service is accessible via modem or ISDN" contains a "Phone #:" input field. At the bottom left, there is a button labeled "Flush Cache" with the text "Clears all nonconnection resources from your settings file" above it. At the bottom right, there are "Cancel" and "Save" buttons.

Service Setup (IPX)

The 'Service Setup' dialog box is shown with the 'Connect via:' dropdown set to 'IPX.FCP'. The 'User ID' field contains 'ralen' and the 'Password' field contains '***'. The 'Log in as guest' and 'Log in automatically' checkboxes are unchecked. The 'Retry login' spinner is set to 0 times and the 'Retry delay' spinner is set to 0 seconds. The 'Fill in if service is accessible via the network' section has 'Server' set to 'Veritec' and 'Network' is empty. The 'Fill in if service is accessible via modem or ISDN' section has 'Phone #' empty. The 'Flush Cache' button is visible. 'Cancel' and 'Save' buttons are at the bottom.

Service Setup (modems and ISDN)

The 'Service Setup' dialog box is shown with the 'Connect via:' dropdown set to 'MODEM.FCP'. The 'User ID' field contains 'ralen' and the 'Password' field contains '***'. The 'Log in as guest' and 'Log in automatically' checkboxes are unchecked. The 'Retry login' spinner is set to 0 times and the 'Retry delay' spinner is set to 0 seconds. The 'Fill in if service is accessible via the network' section has 'Server' and 'Network' empty. The 'Fill in if service is accessible via modem or ISDN' section has 'Phone #' set to '9,1-416-999-9999'. The 'Flush Cache' button is visible. 'Cancel' and 'Save' buttons are at the bottom.

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After you have configured service setup information

Once you have filled in the Service Setup window, do one of the following:

For this connection type	Do this
TCP/IP	Go to “Configuring TCP/IP or UDP/IP connections” on page 257.
UDP/IP	

After you have configured service setup information

For this connection type	Do this
AppleTalk	Click Save to return to the Login screen. Your connection is now configured.
IPX	Click Save to return to the Login screen. Your connection is now configured.
Windows (TAPI) modem	Go to “Configuring Windows (TAPI) modem connections” on page 259.
FirstClass/serial modem	Go to “Configuring FirstClass/serial modem connections” on page 260.
Comm Toolbox	Go to “Configuring Comm Toolbox connections” on page 262.
ISDN	Go to “Configuring Windows ISDN (CAPI) connections” on page 263.

Configuring connection information

This chapter only applies to TCP/IP, UDP/IP, modem, Comm Toolbox, and ISDN connections.

After you have configured service setup information as described in Chapter 35, “Configuring service setup information”, the final step in configuring your connection is to supply connection information.

Note If you see fields that are not described here, leave them unchanged. They either do not apply to your connection, or the appropriate values have been automatically set. Only change these values if instructed to by your administrator.

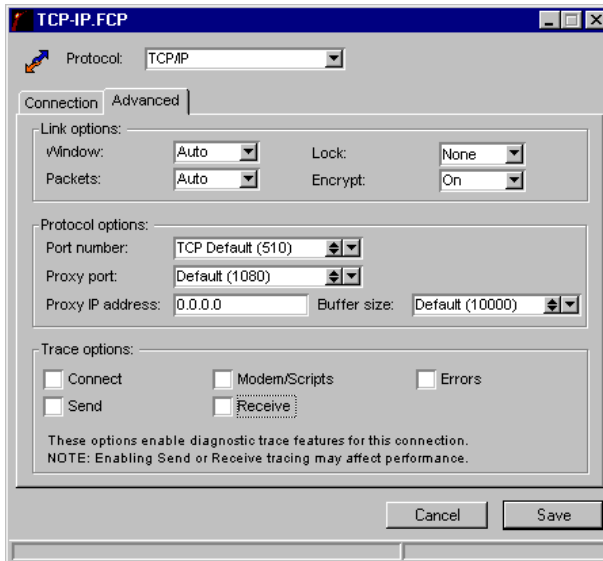
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Configuring TCP/IP or UDP/IP connections

To configure connection information for TCP/IP or UDP/IP:

1. Click Advanced at the Service Setup window.
2. Click the Advanced tab.

Advanced settings (TCP/IP)



3. Fill in the following fields:

- Port number** the TCP/IP or UDP/IP port on the server
If you change the default, you change it for every settings file that uses the TCP/IP or UDP/IP connection.
- Proxy port** *only applicable if you connect through a proxy server*
the port used to connect to the proxy server
The Default value of 1080 is the normal proxy server port.
- Proxy IP address** *only applicable if you connect through a proxy server*
the proxy server's IP address
If you do not use a proxy server, leave this at 0.0.0.0.
- Buffer size** specify between 6000 and 64000
The larger the buffer, the better the download performance, but the more memory you will need on the computer where the FirstClass client is installed. The default of 10000 is normally adequate.

4. Click Save twice to return to the Login screen.

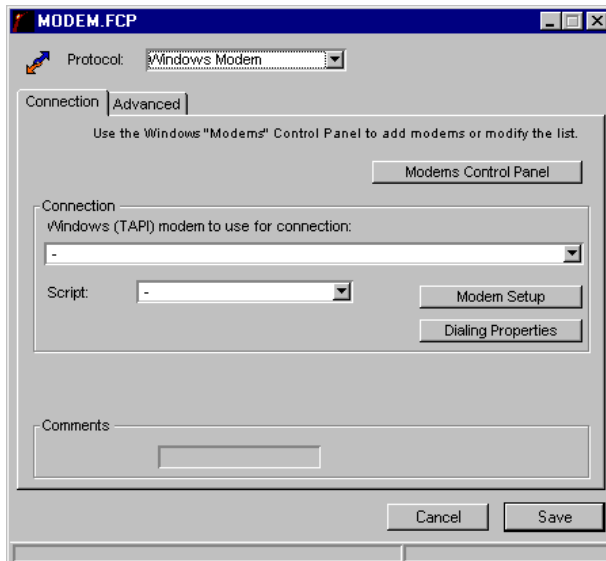
Your connection is now configured.

Configuring Windows (TAPI) modem connections

To configure connection information for a Windows modem:

1. Click Advanced at the Service Setup window.

Advanced settings (Windows modem)



2. Fill in the following fields:

Protocol	choose Windows Modem
Windows (TAPI) modem to use for connection	only applicable if you have multiple TAPI modems configured on your computer the modem to use for this connection
Script	if you require a special connection script to connect to the server your connection script file
	For information on connection scripts, see AdvConf.pdf on the FCIS CD, or contact your administrator.

Line to use *if this field is displayed*
the line to use for this connection

Note The buttons on this form take you to Windows modem setup windows. They are only necessary if you need to reconfigure your TAPI modem. These windows are described in your Windows documentation.

3. Click Save twice to return to the Login screen.

Your connection is now configured. Unless you install a different type of modem, or connect the modem to a different serial port, you will never need to reconfigure the connection information.

Configuring FirstClass/serial modem connections

To configure connection information for a FirstClass/serial modem:

1. Click Advanced at the Service Setup window.

Advanced settings (FirstClass
modem)

The screenshot shows a window titled "MODEM.FCP" with a blue title bar. Below the title bar is a "Protocol:" dropdown menu set to "FirstClass Modem". The window has two tabs: "Connection" and "Advanced", with "Advanced" selected. Below the tabs is a section titled "Set your modem, port and cable options:". This section is divided into three columns. The first column, labeled "Connection", contains dropdown menus for "Modem:" (set to "GVC_288.MDM"), "Port:" (set to "COM2"), "Phone:" (set to "Tone"), "Speaker:" (set to "On"), and "Script:" (set to "-"). The second column, labeled "Cable options", contains dropdown menus for "HW handshake:" (set to "On"), "DTR hangup:" (set to "On"), and "Carrier detect:" (set to "On"). The third column, labeled "Speed options", contains dropdown menus for "Auto speed:" (set to "Off") and "Baud rate:" (set to "57600"). At the bottom of the window is a "Comments:" text area containing the text "Requires a HWHS cable for high speed use." and two buttons: "Cancel" and "Save".

2. Fill in the following fields:

Protocol FirstClass Modem is selected for you if you are on Windows. Serial is selected for you if you are using Mac OS.

Modem the type of modem you are using
 If your modem does not appear in the list, choose a compatible modem with the same speed as your modem. For example, if you have a V.32bis modem, choose Hayes Compatible 14400.

applies to Mac OS only

If you cannot find a suitable modem type in this list, you can add the type you need to the list. To do this, double-click the Other file on the FCIS CD. This creates an Other Modems folder that contains additional modem types. Drag the modem type you want from this folder to FirstClass' Modems folder. Drag only the modem type you need, or FirstClass will take a long time to produce the list of modem types.

If you still cannot find a suitable modem type, contact your administrator.

Port the port to which your modem is connected (for example, COM2 for Windows or Modem Port for Mac OS)

Phone your phone line type
if you have a dial phone
 choose Pulse
if you have a touch tone phone
 choose Tone

Speaker whether you want the modem speaker turned on or off during dialing and negotiation
 Some modems are not affected by this choice.

- Script** *if you require a special connection script to connect to the server*
your connection script file
- For information on connection scripts, see AdvConf.pdf on the FCIS CD, or contact your administrator.
- H/W handshake** *if your modem supports hardware handshaking, and On is recommended in the Comments section*
accept the default On

3. Click Save twice to return to the Login screen.

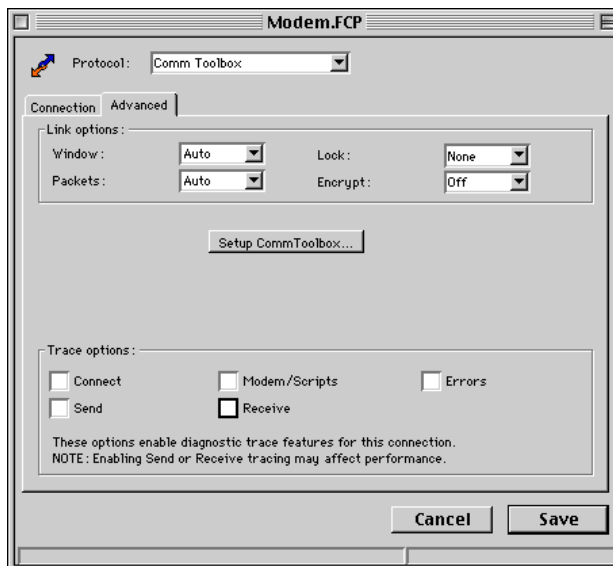
Your connection is now configured. Unless you install a different type of modem, or connect the modem to a different serial port, you will never need to reconfigure the connection information.

Configuring Comm Toolbox connections

To configure connection information for a Comm Toolbox connection:

1. Click Advanced at the Service Setup window.

Advanced settings (Comm Toolbox)



2. Choose Comm Toolbox at Protocol.

If your Comm Toolbox cannot directly access the serial card in your computer, choose Comm Toolbox Serial, then fill in the fields on the Connection tab as instructed by your Comm Toolbox documentation.

3. Click the Advanced tab.

4. Click Setup Comm Toolbox and configure the Comm Toolbox settings as instructed by your Comm Toolbox documentation.

5. Click Save twice to return to the Login screen.

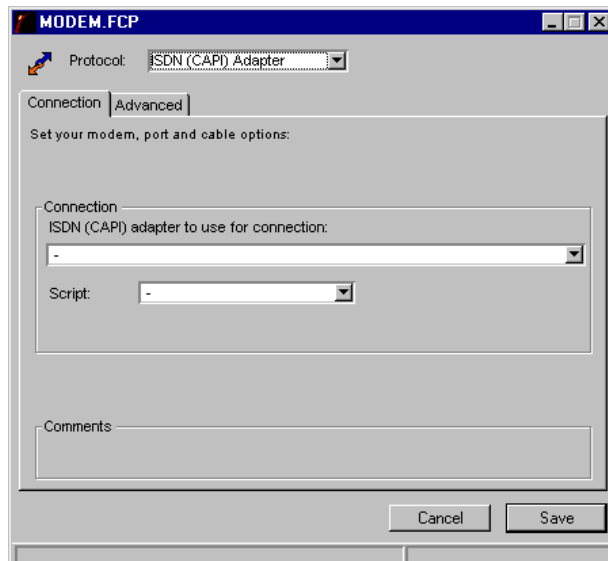
Your connection is now configured.

Configuring Windows ISDN (CAPI) connections

To configure connection information for ISDN:

1. Click Advanced at the Service Setup window.

Advanced settings (ISDN - Connection)



2. Fill in the following fields:

Protocol choose ISDN (CAPI) Adapter

ISDN (CAPI) adapter to use for connection

only applicable if you have multiple ISDN adapters configured on your computer
the adapter to use for this connection

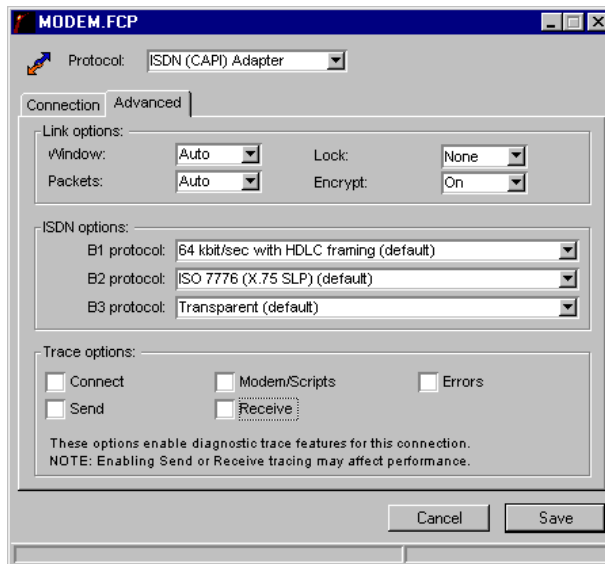
Script

if you require a special connection script to connect to the server
your connection script file

For information on connection scripts, see AdvConf.pdf on the FCIS CD, or contact your administrator.

3. Click the Advanced tab.

Advanced settings (ISDN – Advanced)



4. Choose your B1, B2, and B3 protocols at ISDN options.

If you have not received the appropriate protocol values from your administrator, try accepting the defaults first. If the connection does not work, try choosing Transparent at B2 protocol.

5. Click Save twice to return to the Login screen.

Your connection is now configured.

Troubleshooting

Possible problems

This chapter describes problems you may encounter:

- when trying to connect to a server over a network
- when trying to connect to a server using a modem
- when using FirstClass Personal to work offline
- when using a web browser.

If you need additional help, contact your administrator.

Problems connecting over a network

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Be sure to read the “Configuring your FirstClass connection” section of this book to set up your network connection.

If you cannot connect to an FCIS server over a network, check whether:

- your settings file is incorrectly configured
For example, the server domain name is wrong.
- the appropriate .fcp file is missing from FirstClass’ FCP folder
If this is the case, contact your administrator for a copy of the file.
- the server is not running
To check whether this is the case, contact your administrator.
- all sessions on the server are in use
The server is set up to handle a limited number of simultaneous connections. Try again later. If you still cannot connect, contact your administrator.

- your network interface card (NIC) is configured incorrectly, or it or the cable is defective.

For information on configuring your NIC, see the documentation provided with it.

Problems connecting using a modem

Be sure to read the “Configuring your FirstClass connection” section of this book to set up your modem connection.

To test your modem configuration, connect to another modem using a terminal emulation package, such as Windows Terminal. For more information, see your modem documentation.

Where the problems discussed here are reported by FirstClass, the FirstClass error number is included.

No response from the modem (1034)

This problem occurs when FirstClass sends the modem a command, but does not receive an OK response from the modem. Possible reasons for this error are:

- the modem is not turned on
- the modem has stopped working and needs to be reset
Turn the modem off and on again.
- the modem is not connected to the serial port that was specified when you configured connection information
- the modem cable is not connected properly, is defective, or does not support hardware handshaking
- the baud rate that was specified when you configured connection information is inappropriate for this type of modem
- hardware handshaking is enabled, but your serial cable does not support hardware handshaking

Either reconfigure your connection information to specify a modem type that does not support hardware handshaking, or obtain the correct cable.

- the modem and another device have been assigned the same Interrupt Request (IRQ) number.

Modem returned an error (1054)

This problem occurs because you specified the wrong modem type for your modem when you configured connection information.

No response from the server's modem

Possible reasons for this error are:

- the modem at the other end is not connected to an FCIS system

Make sure you are specifying the correct modem phone number, with any necessary dialing prefixes, in your service setup information.

- your modem is incompatible with the server's modem

This is especially common for modems that offer high speeds or advanced protocols. Try lowering the baud rate in your connection information.

- a poor phone connection is causing line noise

This is common for long distance calls. Try the call again.

- you specified the wrong modem type for your modem when you configured connection information

- the value of the connect timeout register (S7) is too short.

Use a text editor to open the modem (MDM) file you are using and change the MLTO value. This value is in 60ths of a second. Try 90 seconds (MLTO=5400). Your value here will map to the S7 register. For more information on the S7 register, see your modem documentation.

Host does not appear to be an FCIS server

Possible reasons for this error are:

- the two modems negotiated, but the system at the other end did not respond to the FirstClass login request

Make sure you are specifying the correct modem phone number, with any necessary dialing prefixes, in your server setup information.

- there are hardware handshaking problems (Mac OS).

Make sure you have a cable that supports hardware handshaking. For more information on hardware handshaking, see AdvConf.pdf on the FCIS CD.

Communication failed while connected

When a modem connection fails while a call is in progress, the cause can be difficult to identify. Possible reasons are:

- a poor phone connection is causing line noise
This is common for long distance calls. Try the call again.
- another application, such as a screen saver, graphics application, or file compression utility, running on your computer is using up available system resources
Quit other applications and try again.
- *if you have a high-speed modem and are also connected to a network*
the network packets may be interfering with the serial port
Disable the network connection and try again.
- the baud rate that was specified when you configured connection information is too high.

Problems using FirstClass Personal

If an error occurs while you are working offline, FirstClass Personal reports the error in a message sent to your offline Mailbox. For more information on a specific error, contact your administrator.

Be sure to read Chapter 32, “Working offline” for information on FirstClass Personal.

You cannot work offline

Make sure that FirstClass Personal has been installed correctly. Both the FirstClass Personal application and your personal post office folder must be in the FirstClass application folder.

FirstClass Personal does not connect to the server

Possible reasons for this error are:

- your settings file is not configured correctly

Be sure to read the “Configuring your FirstClass connection” section of this book for information on configuring your server connection.

- FirstClass Personal is not configured correctly
Make sure the user ID and password are correct in FirstClass Personal’s settings.
- a modem connection failed.

No server with that name (1044)

You may not have enough memory to run both the FirstClass client and FirstClass Personal. Together, these applications require 8 megabytes available RAM.

No matching names found in Directory

When you are addressing a message, this error may occur because:

- you entered the name incorrectly
- you do not have an offline copy of the Directory, or it is out of date.

If you specified that you did not want to replicate Directory information offline, you must configure FirstClass Personal to accept unknown names.

You do not have access to a conference

Possible reasons for this error are:

- conference replication is not set up correctly
Remember to create a copy in the online version of your Offline Conferences folder for every conference you want to access using FirstClass Personal.
- automatic conference replication is disabled
Either reconfigure FirstClass Personal to specify that you want conferences to replicate on each connection, or connect manually.
- your administrator has never granted you access to the conference
Contact your administrator to verify whether you have a subscription to this conference.

- you do not have the authority to see the conference.

You have the same access permissions offline as you do online, so you will not be able to view conferences in FirstClass Personal that you cannot view online.

You get an error when FirstClass Personal tries to replicate

Check with your administrator to make sure that your user privileges include working offline.

Problems using a web browser

You get a Login screen when you are already logged in

You may have tried to do something for which you are not authorized. In this case, your browser may ask you to log in as someone with the appropriate authority. To get out of this state, cancel the Login screen, then back up until you are out of the task you were trying to perform.

You cannot see older messages in a thread

There is a limit to the number of FCIS messages that can be displayed with a web browser. Only the most recent messages are shown. To see an older message in a thread, open a more recent message, then click Previous in Thread.

Troubleshooting aids

This chapter describes tools available to help you troubleshoot FirstClass and FirstClass Personal problems.

FirstClass trace information

Trace information tells you how the connection between your FirstClass client and an FCIS server is operating. You can use this information to help you solve your problem on your own, or with the help of your administrator.

Trace information can be logged for various connection events. This information is stored in the FirstClass client log file (FCIC.log in Windows, FirstClass@.log on the Mac OS), which is created when you run FirstClass.

Note In Windows, FirstClass saves the log file with an extension of .old when you quit. On the Mac OS, FirstClass overwrites the log file each time you start the client. To save log information permanently, save the log file before you quit FirstClass.

When you supply connection information as part of configuring your connection, you can specify the events for which you want trace information logged. For information on configuring your connection information, see Chapter 36, “Configuring connection information”.

To specify the trace information to log:

1. Open the FCIS Login screen.

2. Make sure a settings file is selected that uses the type of connection (for example, TCP/IP) for which you want to log trace information.

Note Trace information will be logged for every settings file that uses this type of connection.

3. Click Setup to open the Service Setup window.

You can verify that you are configuring the correct connection type by looking at the value in Connect via. For example, to log trace information for a modem connection, this field should say MODEM.FCP.

4. Click Advanced to open the advanced settings window.
5. Click the Advanced tab.
6. Select the events for which you want trace information at Trace options:

This option	Records information about
Connect	connection messages
Send	packets sent*
Modem/Scripts	modem and scripting commands
Receive	packets received*
Errors	packet errors

* Selecting this may decrease your link speed significantly, because it instructs FirstClass to write a great deal of data to disk.

7. Click Save twice to return to the Login screen.
8. *for Windows users only*
Add the following line in the [FCSetup] section of the FCIC.ini file in your Windows folder:
debug=1

FirstClass Personal troubleshooting tools

FirstClass Personal logs offline activity in two places:

- the FirstClass Personal console
- the FirstClass Personal log.

FirstClass Personal console

The FirstClass Personal console updates as you use FirstClass Personal. You can view console information in the following ways:

- *in Windows*
Click the FirstClass Personal icon on the taskbar.
- *on Mac OS*
Double-click the FirstClass Personal icon in the FirstClass client folder, then choose Personal > Show Personal Console.

FirstClass Personal icon



The FirstClass Personal console window opens.

FirstClass Personal console

```

FirstClass® Personal 5.5
File Edit Personal
Logging console messages to C:\FCICWIN\FCSPRA.LOG.
FirstClass® Personal 5.5
Copyright © SoftArc Inc. 1990-1998

Load: Sync Groups Gateways Stats Routes
Connect using: C:\FCICWIN\Settings\Veritec.fc
Server:      veritec.com
User:       Roy Allen
[02/10/98 16:47:51] FirstClass® Personal 5.5 started.
[02/10/98 16:47:52] Session 5.501 Start Local Sess 100 User
[02/10/98 16:48:25] Gateway veritec.com could not be started
not found Gateway-Sess 101
  
```

To record more detail in the console, choose one of the following:

- Personal > Trace Connection Activity
Records detailed information about connection activity.
- Personal > Enable Replication Log.
Records detailed information about replication.

FirstClass Personal log

The FirstClass Personal log records the same activity as the console, but in a text file that you can view with any application that displays plain text files.

In Windows, this log is called fcspra.log, and is located in your FCICWIN folder.

On Mac OS, this log is called FirstClass Personal.log, and is located in your FirstClass® Intranet Client folder.

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